Wichita Area Benefit Professionals

13th Annual
Healthcare Symposium

April 16, 2024

Wichita Area Benefit Professionals
Presents the 13th Annual
HEALTHCARE SYMPOSIUM

Conference Agenda

7:30 am – 7:55 am	**Registration and Breakfast**
7:55 am – 8:00 am	**Welcome – WABP President, Jalaa Miller**
8:00 am – 9:00 am	**Megan Mamarella Caputo, SVP, Corporate Programs & Advocacy, National Association of Benefits Insurance Professionals** *The session examines an overview of the current congressional landscape; 2022 and 2023 legislation that is being implemented; newly introduced legislation in the 118th Congress; major regulatory actions that have been taken and are expected in the near-term and later; NABIP federal priorities, including employer reporting, site-neutral payment reform, single-payer, etc.; and how NABIP members, the overall agent/broker community, and employers can get involved.*
9:00 am – 10:00 am	**Meg McKeen, Founder & Consultant, Adjunct Advisors LLC -Keynote Speaker** *Insight and advice for insurance professionals to identify imposter syndrome in themselves and work through it.*
10:00 am – 10:20 am	**Break & Visit Exhibitor Booths**
10:20am – 12:10 pm	**David Mordo, D Mordo Employee Benefits Consulting** *This continuing education course seeks to educate, explain, and discuss the many parts of prescription drugs and their impact on health care and health benefits in America. This is not an indictment of any of the stakeholders but merely an honest discussion of the complex nature of prescription drug costs and administration. The information in this course will hopefully provide a foundation of the industry, the role of prescription drugs as a means of providing medical treatment, and the payment of those benefits, along with predictions for the future.*
12:10 pm – 1:00 pm	**Lunch & Visit Exhibitor Booths**
1:00 pm – 1:50 pm	**Steve Smith, Partner with Hinkle Law** *Legal requirements related to the laws governing employer-sponsored group health plans going in depth into the Consolidated Appropriations Act of 2021.*
2:00 pm – 2:50 pm	**Chris Ecos, CEBS, Health Insurance Historian** *Overview of the history of how insurance started in America to where we are today!*
2:50 pm – 3:00 pm	**Break & Visit Exhibitor Booths**
3:00 pm – 3:50 pm	**Shelly Duncan, Executive Director, Project Access** *This presentation will provide an overview of the nonprofit organization Central Plains Healthcare Partnership, Project Access Program.*
3:50 pm – 4:00 pm	**Closing Remarks – WABP President, Jalaa Miller**

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Megan Mamarella Caputo, Vice President of Congressional Affairs, National Association of Benefits Insurance Professionals

Megan Mamarella Caputo is senior vice president of corporate programs and advocacy at NABIP. She leads membership recruitment for large agencies, companies and national producer groups and oversees all corporate partner accounts. She is the main contact for NABIP's Principals Council and General Agency Principals Council. She is the staff liaison to the NABIP Legislative Council's employer and prescription drug working groups. Megan is in her second tenure at NABIP, having served as director of state affairs, where she was a frequent presenter for NABIP chapter events and regularly testified before the National Conference of Insurance Legislators (NCOIL).

Items Covered:

Upon completion of the course, the participant will know:

- NABIP's strategies to achieve policy goals;
- Specific policy proposals that have been and are under consideration or are being developed by Congress and the Administration;
- The political background, changes and processes that are leading to particular actions being made and how NABIP works to influence these processes;
- Policy positions of the association in affecting change in health reform at both the legislative and regulatory levels and how those positions are developed;
- Tools and resources for becoming active and engaged in these processes.

Meg McKeen, Adjunct Advisors

Celebrating her 25th year in the industry, Meg McKeen founded Adjunct Advisors LLC in 2018 with the essential belief that the way we sell insurance is ripe for change. Throughout her career, working both as an underwriter and agent within the insurance industry, Meg has held a seat at the table during thousands of insurance negotiations. Meg now holds space, at the crossroads of personal and professional development, for individuals and organizations as they grow their sales and leadership acumen through private coaching, consulting engagements, and the podcast she hosts, Bound & Determined℠. Meg's contributions to the insurance industry have been recognized with her inclusion in *Insurance Business America*'s Hot 100 and Elite Women for 2021.

A graduate of Illinois Wesleyan University, with roots in Chicago, Meg is currently a digital nomad, in the midst of a thoughtful travel adventure. When she's not helping business professionals, you can find Meg putting the "practice" into yoga practice, searching for the best vegan bakery, or cheering on her favorite independent musicians. Learn more at www.adjunctadvisors.com.

Items Covered:

- Is this feeling I've been feeling imposter syndrdome?
- How to spot imposter syndrome in yourself and others
- Making friends with your inner critic
- Imposter syndrome can be a strength

David Mordo, D Mordo Employee Benefits Consulting

David Mordo started his insurance career in 1980 as a Sales Representative with Metropolitan Life Insurance Company in his hometown of Brooklyn, New York. In 1985, he branched out on his own, leaving MetLife and opening D. Mordo & Associates LLC in New York City selling individual life and disability insurance, group health and life insurance and annuities.

David sold his agency in 1994 after having moved to Middletown, New Jersey and took a job as a sales representative with Colburn Insurance Services in Manasquan, NJ selling group health insurance products and started to recruit brokers to the agency.

In December of 2000, Dave went to work at Walsh Benefits, an employee benefits General Agency located in Fair Haven, NJ where he directed the Small Group Operations department.

In July of 2013, Dave was named Vice President of Education, Compliance & Medicare Operations for Walsh Benefits. In that capacity, Dave worked with the agency's brokers to prepare them for changes in the industry as a result of the Affordable Care Act.

In February of 2016, went to work as Director of Compliance and Broker Education at Slattery GA, a subsidiary of Arthur J. Gallagher & Co. in Holmdel, NJ. Dave was a Sr. Compliance Analyst with BenefitMall via its acquisition of Slattery GA until his recent retirement in July of 2023.

He was also Director of the BenefitMall School of Insurance where he taught continuing education courses to brokers in many states around the country.

In his 43 years in the industry, Dave has focused on consulting with brokers as well as small and large employers in the area of ERISA, HIPAA and PPACA and other employer issues concerning healthcare and health insurance. His advocacy on behalf of employers has taken him to the halls of Trenton and Washington, D.C. where he speaks with state and federal legislators and regulators.

He also works on a part-time as a Sr. Compliance Advisor for MZQ Consulting.

As an active member of NABIP since 1999, Dave has served as a chapter president and local and state legislative chair. Nationally, Dave has served on NABIP's Finance, Governance, LPRT and Media Relations Committees. He served on NAHU's National Legislative Council from 2011 to 2017 and was NABIP's National Legislative Chair in 2016. He recently became an instructor with NABIP's Online Learning Institute, teaching a few of the certification courses.

He currently serves as the Region 2 Vice President.

Items Covered:

- History of the pharmaceutical industry
- The Pharmaceutical Industry impact
- The FDA Impact on the Regulation of Drugs
- The Supply Chain Players
- Drug Categories & Classifications
- The Pharmacy Spend Impact on Benefits
- The Secrets of Prescription Drug Cost and Impact on Health Care Spending
- Being Your Best Benefit Consultant

Steve Smith, Partner with Hinkle Law

Steven P. Smith is a member of the Hinkle Law Firm LLC in Wichita, where he has practiced employee benefits law for the past 20+ years. Mr. Smith received his law degree with honors from the University of Kansas School of Law in 1988. He is listed in *Best Lawyers* and in *Chambers and Partners.* He is also a member of the Gulf Coast Area TE/GE Council and has taught employee benefits law as an adjunct professor at the University of Kansas School of Law.

Items Covered:

During his presentation he will review:

- Big Picture Observations
- No Surprises Act
- Prescription Drug Reporting Requirement
- Gag Clause Attestation Requirement
- Required Fee Disclosures from Brokers & Consultants
- MHPAEA – NQTL Requirements

Chris Ecos, CEBS, Health Insurance Historian

Chris moved to Wisconsin for a sales job with Toledo Scale shortly after graduating from The Ohio State University with a degree in Marketing. There, he earned a varsity letter on the Fencing team as he picked up a sport he had never seen before attending college. An early example of his discovery and desire for personal growth.

He later was the Marketing Director for a real estate asset company started by former Green Bay Packer, Bob Long. Chris along with another partner at the company and former Packer, Bart Starr, crossed the country presenting this investment option to financial planners and investors for nearly 7 years.

Chris then joined one of the largest health insurance companies in the world. For over 28 years he was regarded and recognized as a top performer nationally. He was intensely focused on bringing complex administrative, network and clinical solutions to advisors and large employers throughout Wisconsin and beyond. Often, he would be asked to present his company's value to a prospect in a finalist meeting. His ability to make immediate connections with people and to make complex concepts relatable drove his success.

His curiosity led him to research it and realize that he too had gaps in knowledge of this history. It was the catalyst for his development of this presentation. In addition to presenting An Accident of History: Health Insurance in America, Chris is creating presentations on other relevant topics as well as continuing to mentor Account Executives at his former employer.

He and his wife reside in the Milwaukee WI area.

Items Covered:

Join Chris as he shares the story of how, for over a century, we have survived the challenges, disruptions and…the collisions…to provide Americans, even with all our issues, what many believe are the greatest healthcare options in the world. It is certain to provide a thought-provoking discussion about the future of our employer-based health insurance coverage

Shelly Duncan, Executive Director, Project Access

Shelley has spent her career in the social service sector after graduating from Wichita State University with undergraduate and graduate degrees in psychology. She is a Licensed Clinical Psychotherapist. Her career spans from working at a maximum-security prison providing psychological evaluations and therapy, to working at a community mental health center as director of a sexual abuse treatment program followed by directing a children's mental health program. She worked at EmberHope Youthville (a child welfare organization) for 19 years, serving as President and CEO for her last 12 years. She implemented one of the first trauma programs specifically designed for youth in foster care.

Shelley has been the Executive Director of Project Access (an affiliate of the Medical Society of Sedgwick County) since July of 2017. From 2018 until 2023 she also assumed two other programs as Executive Director; Health ICT (a CDC grant funded program focused on improving chronic health conditions) and the Kansas Business Group on Health. In her current role, she is focused on innovative methods for improving the health and wellness of those served by Project Access including expansion to provide behavioral health care. She is passionate about helping employers improve the value of their health care benefits through quality improvement and cost reduction.

Shelley has served on various boards and statewide committees. She is currently on the Sedgwick County Animal Control Advisory Committee. In her spare time, she enjoys physical fitness, traveling with her husband of 41 years and babysitting her grandchildren. Shelley and her husband have four adult children, 6 precious grandchildren (and one on the way), and the best dog ever.

Items Covered:

An understanding of the purpose and goals of Project Access Program to include;

- The population that is served by Project Access Program.
- The funding for Project Access Program.
- The staffing for Project Access Program.
- Outcomes for Project Access Program.
- Services provided for Project Access Program, including details on pharmaceuticals.

Understanding of the role of Community Health Workers
Understanding of Health Equity and Unconscious Bias
Future goals of Project Access

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