2026 Executive Forum Speakers

Speakers as of 1/29/2026 – speakers and topics are subject to change

HCAA President: Kirti Mutatkar, President & CEO, UnitedAg

Kirti Mutatkar assumed the role of President and Chief Executive Officer of UnitedAg in May 2014. Under her leadership, UnitedAg is empowering its members and employees to take a unique and collaborative approach in working together to provide new and innovative solutions to health care and, ultimately, to position UnitedAg as one of the foremost agricultural associations in California.
Through this collaboration, Kirti has been able to cultivate a deeper understanding of UnitedAg's mission and vision that comes from truly working with and understanding the members, the industry, and their respective needs. Kirti is tireless in her efforts to engage with members by visiting them in the field, providing informational forums throughout the state, and eagerly leaving her door open for ongoing dialogue. She listens to members' concerns, issues and perspectives and develops solutions based on their input. This approach is creating a new dynamic in the agricultural industry and will ensure that UnitedAg continues to deliver the highest quality service for members and the industry as a whole.

Kirti joined UnitedAg in 2001 and served as the Chief Financial Officer for 10 years. As CFO, Kirti directed all operations of the organization, was instrumental in a complete company reorganization, launched a Third-Party Administration division, and developed a business plan to strategically prepare UnitedAg for the impact of the Affordable Care Act in 2014.

She holds master's degrees in both finance and microbiology and rounded out her studies by completing the UCLA Anderson School of Management Executive Program.

Carol Berry, Chief Executive Officer, HCAA

As HCAA's Chief Executive Officer, Ms. Berry is responsible for increasing the industry presence of HCAA and for promoting membership activity and the value of connection. She is responsible for supporting the efforts of HCAA's Board to maintain and enhance current relationships with industry organizations and for creating new relationships, which bring value to HCAA. She also provides strategic

direction and operational oversight for HCAA's staff. Ms. Berry reports to HCAA's Executive Board. Ms. Berry has extensive experience in health care, self-funding and software industries providing them with corporate leadership, operations consulting, product positioning and strategic planning services. She has held successful executive positions in self-funding, managed care, behavioral health, and group medical insurance companies. She served as HCAA's President 2001-2002 and was awarded the HCAA designation of a Certified Self-Funding Specialist® (CSFS®) in July 2009. She has been HCAA's first CEO since 2014.

Conference Emcee: Ernie Clevenger, Immediate Past President, HCAA & President, MyHealthGuide, LLC

Mr. Clevenger is retired President of CareHere, LLC, a Premise Health company, which provides onsite medical, wellness and pharmacy management for public and private employers. He continues to pursue innovative ways to deliver health care to self-funded employers, their employees and family members.

Mr. Clevenger is widely known for the weekly *MyHealthGuide Newsletter*, going each week to over 5,000 subscribers. The *Newsletter* provides a compilation of selected articles impacting TPAs, Stop Loss Carriers and MGUs, self-funded employers and others in the self-funded medical and work comp arena.

Mr. Clevenger's earned a BA in Mathematics from David Lipscomb University, an MBA from Vanderbilt University, FLMI from the Fellow Life Management Institute and a Black Belt in Taekwondo.

Tuesday, February 24, 2026

8:30 – 9:30 AM **ITS YOUR SHIP—ACHIEVING BREAKTHROUGH PERFORMANCE**

Presented by: Mike Abrashoff, Former Commander, USS Benfold and Author, It's Your Ship

Mike Abrashoff was the most-junior officer in the Pacific Fleet when he took command of the near-worst performing ship. Twelve months later, the USS Benfold was the best ship in the entire Navy – using the same crew. The story of that stunning transformation has lessons for every organization: leadership matters – and culture is everything. Mike's written four books – his first, It's Your Ship, has sold over 1.5 million copies. His Leadership Roadmap offers clear, battle-tested, and actionable steps. Mike shows people at every level of the organization how to engage and take incremental steps toward change that can make a dramatic difference at work. Mike is clear, "I didn't turn the ship around – my crew did that. What I did was to create an environment where they felt safe, empowered and supported. When you do that, anything is possible."

In many ways, what Mike was able to do with the USS Benfold was an extreme example of the same problems facing many organizations today. That's why dozens of publications including The Wall Street Journal, Harvard Business Review, and Fast Company have cited Mike's story as an inspiring lesson for business. Leaders especially identify with Mike's being accountable for the results in an environment where he couldn't make the rules.

"When my crew came to me with a problem, I'd say 'It's your ship – how would you fix it?'." Mike focused on the one thing he could influence: his crew's attitude, because culture is the ultimate competitive weapon for any organization.

Mike's established a set of management principles that he calls The Leadership Roadmap. At the core of his leadership approach on Benfold was a process of replacing command and control with commitment and cohesion, and engaging the hearts, minds, and loyalties of workers with conviction and humility. "The most important thing that a captain can do is to see the ship through the eyes of the crew. The idea is to empower every individual to share the responsibility of achieving excellence."

By every measure, these principles achieved breakthrough results: turnover decreased to an unprecedented 1%; the rate of promotions tripled; and the crew slashed operating expenses by 25%. Regarded as the finest ship in the Pacific Fleet, Benfold won the prestigious Spokane Trophy for having the highest degree of combat readiness. This remarkable turnaround was accomplished by the very same crew that had performed so poorly just months before.

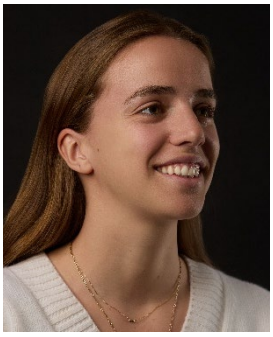
Mike is author of four books. His first, It's Your Ship, has a timeless message: don't use outside forces that stand in your way as excuses – control the things you can influence and amazing results will happen. His next books, It's Our Ship and Get Your Ship Together, showed how these principles have been put into action by business leaders in their own organizations. Mike's latest book, Ship Happens (co-authored with Stacey Cunningham), serves as a guide for leaders, detailing his strategies for transforming USS Benfold into the top-performing ship.

A popular keynote speaker for audiences looking to ramp up organizational performance, Mike has spoken to every industry and kind of audience – from board retreats to front line personnel; from sales groups to universities; from Fortune 500s to startups. He inspires audiences to rethink their beliefs about leadership and organizational culture and tailors the message to focus on engagement, execution, change, safety, diversity, leadership, teamwork, innovation, accountability and more. Prior to commanding USS Benfold, Mike served as the Military Assistant to Secretary of Defense William J. Perry. He also helped draft the air defense plan for naval forces in the Persian Gulf in 1990, coinciding with Iraq's invasion of Kuwait; and served as the executive officer of the Cruiser Shiloh, where he deployed to the Persian Gulf in support of United Nations sanctions against Iraq.

Mike Abrashoff is the founder of Aegis Performance Group, a consulting firm which works with and supports leaders as they address leadership, talent and performance challenges within their organizations. Mike and his team prompt leaders at all levels to re-imagine their leadership thinking and create new ways to elevate individual, team and organizational performance.

10:00 – 11:30 AM HOW TO ACTUALLY USE AI: A HANDS-ON MINI-HACKATHON FOR SELF-INSURED LEADERS

Presented by: Hermine Tranie, Co-founder & CEO, ClarityCare AI; and Alex Andrei, Co-Founder & CTO, ClarityCare AI



Hermine Tranie, Co-founder & CEO, ClarityCare AI

Hermine is an award-winning AI researcher from MIT & founder of ClarityCare AI, a company dedicated to revolutionizing health utilization management (UM). With expertise in AI applications for healthcare, she has collaborated with leading pharmaceutical & healthcare organizations on streamlining operations with AI. In 2023, she launched ClarityCare AI to empower UM teams to automate and optimize document processing & review against criteria, getting more accurate & faster reviews, while cutting down overall cost. They now process authorizations for half a million patients across outpatient services (imaging, PT/OT, surgeries, DME), inpatient admissions & specialty drugs.

Alex Andrei, Co-Founder & CTO of ClarityCare AI

Alex is a 2x founder. Prior to founding ClarityCare AI, he led for 5y AI initiatives in intake & claims processing for various insurance types (life, title & re-insurance). He's also an open-source contributor to healthcare standards (HL7, FHIR) & security protocols (ISO, IEEE) still in use today.

1:00 – 2:00 PM **FACING THE FUTURE: SURGING COSTS AMD REGULATORY SHIFTS THAT DEMAND BOLD LEADERSHIP**

Presented by: Ashley Gillihan, Partner, Alston Bird

Ashley Gillihan is a partner at Alston & Bird, LLP and is a member of the firm's Employee Benefits and Executive Compensation Group. Mr. Gillihan represented employers and third party administrators for nearly 30 years in a variety of health and welfare benefit plan compliance matters, including, but not limited to, consumer driven health care plan design, tax qualification, ERISA, ACA and HIPAA privacy.

Mr. Gillihan lectures frequently and has published a number of articles on health and welfare benefit plan compliance topics. He is a member of the Technical Advisory Committee for the Employer's Council on Flexible Compensation ("ECFC"), and is recognized in Best Lawyers in America for employee benefits.

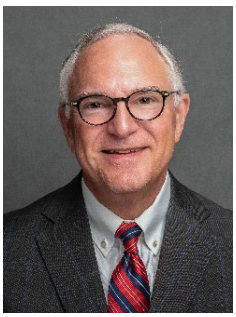
2:30 – 3:30 PM **WHO REALLY WINS? TRANSFORMING THE TPA PLAYBOOK FOR IDR**

Presented by: Mike Strong, Director, Policy & Operations Strategy, Health Plan Cost Containment, Reliant Health Partners, LLC

Mike Strong is the Director of Policy and Operations Strategy at Reliant Health Partners, and he has been working in healthcare for nearly 20 years with payers and providers. He is a former healthcare fraud investigator for the payers with millions in recoveries, a former EMT-B, and a certified medical coder. His experience includes commercial, Medicare, Medicaid, workers' compensation, and auto medical claims. Through his experience, he has calculated Medicare reimbursement by hand in court as an expert witness, and offers many strategies to support and defend savings in many areas of health care. With publications and presentations in healthcare, the No Surprises Act, and medical coding and billing, Mike has a diversified background in healthcare reimbursement and payment integrity.

3:30 – 4:30 PM **BOLD WITHOUT THE NOISE: STRATEGIC CHOICES FOR THE TPA C-SUITE**

Presented by: Todd Archer, President, Concierge Third Partner Administrator; Kasha Ozog, Chief Executive Officer, Coastal Administrative Services; and George Stiles, President & COO, Planned Administrators, Inc.; moderated by Dr. Madeline Smith, Founder/COO, MADDRS, LLC



Todd Archer, President, Concierge Third Party Administrator

Todd Archer serves as President of Concierge Third Party Administrator. With almost 40 years' experience, Todd has a long history of success in the third-party administration of health benefits. Prior to joining Concierge, Todd worked for several regional and national TPAs in various executive management roles.

Todd earned a Bachelor of Science degree in Business Administration (with a specialty in insurance) from the University of Tennessee, Knoxville. He is also involved in numerous industry and community leadership boards and activities including Healthcare Administrators Association (HCAA) – Past Presidents Council; Self Insurance Institute of America (SIIA) – past SIPAC Board Chair; QUBIC, Inc. – Past Board Member; Oklahoma City All Sports Association – Past Board Member; Rebuilding Together OKC – Past Board President.

Kasha Ozog, Chief Executive Officer, Coastal Administrative Services

Kasha Ozog brings extensive experience in benefits administration and healthcare sales. She joined Coastal Administrative Services (CAS) in the 2000s and quickly rose through the ranks, ultimately becoming CEO due to her strong leadership in service excellence and innovation.

Under her guidance, CAS has adopted strategies such as reference-based pricing, hospital bill auditing, and partnerships with healthcare technology firms to improve transparency, compliance, and cost efficiency. Kasha oversees all facets of the business—including operations, strategic growth, and provider network development—ensuring members have access to quality care at affordable rates.

Today, CAS employs a team of 80 professionals and is known for delivering customized, hands-on service. The organization often functions as an extension of its clients' HR teams, driving measurable cost savings and high satisfaction.

She actively incorporates employee feedback, nurtures strategic partnerships with vendors, and explores innovative solutions such as telemedicine and specialty pharmacy carve-outs. Kasha places a strong emphasis on client trust, long-term relationships, and delivering tailored benefit solutions that drive retention and results.

George Stiles, President & COO, Planned Administrators, Inc.

George Stiles is an experienced healthcare executive with more than 25 years leading transformation across payers, TPAs, and managed-care organizations. As President and COO of Planned Administrators, Inc., he oversees a nationally licensed third-party administrator that supports self-funded employers and insurance carriers across the country.

George is known for modernizing operations and driving measurable results—reducing claims turnaround times by over 35%, improving accuracy to 99.5%, and boosting client retention above 95%. He's led major system upgrades, built strong leadership teams, and launched new multi-benefit administration products that added more than $20 million in annual revenue.

In addition to his work at PAI, George is the Founder of Katama Capital Advisors, where he partners with private equity firms on strategic healthcare investments and due diligence for potential acquisitions.

Throughout his career, George has been recognized for his ability to blend operational discipline with a forward-thinking approach—helping organizations modernize legacy systems, strengthen financial performance, and deliver greater value to clients and members alike.

Dr. Madeline Smith, Founder/COO, MADDRS, LLC

Dr. Madeline Smith is the Founder and CEO of MADDRS, LLC (Making A Difference Directing Real Strategy), where she helps TPAs, captives, and healthcare innovators cut through the noise and rebuild what's broken. Often called the TPA Fixer or TPA Builder, Madeline has earned a national reputation for transforming operations, strategy, and leadership within the self-funded space.

A former Chief Growth Officer for a domestic health captive and brokerage agency, she's seen firsthand how misalignment, vendor clutter, and weak communication can erode even the best business models—and she's made a career out of fixing it.

Madeline is also a best-selling author of Whole Lotta $$$ in this MOFO Books 1 and 2. Her books are an extension of her continued work to expose the inefficiencies and misaligned incentives plaguing American healthcare.

Known for her candor, clarity, and unapologetic approach, Madeline brings both edge and empathy to the stage—challenging leaders to think sharper, choose smarter, and lead with focus, not noise.

Wednesday, February 25, 2026

8:30 – 9:30 AM **SMALL GROUP SELF-FUNDING: THE BOLD MOVE TO EXPAND ACCESS**

Presented by: Jonathan Socko, President, East Coast Underwriters; Johnson Schaff, Director of Sales, Professional Benefit Administrators; moderated by Dallas Scrip, President & CEO, Marpai

Jonathan Socko, President, East Coast Underwriters

Jonathan Socko is the President at East Coast Underwriters. Jonathan has his degree from the University of South Carolina. He has been in the Self-Funded industry since 2009, originally with a TPA he held various roles in the operations department including claims, client management, and implementation management. Jonathan has been with ECU since 2012, he originally started in sales and business development before gradually moving into a leadership role. Jonathan became President as of January 2025. He lives in Greer, South Carolina and enjoys spending time with his wife and kids, including being a hockey and dance dad to his two daughters.

Johnson Schaff, Director of Sales, Professional Benefit Administrators

Johnson Schaff is an accomplished insurance industry sales leader with over 17 years of experience. For the past six years at PBA, Johnson has directed business development, sales strategy, client retention, and member experience marketing, working closely with

broker partners to deliver exceptional benefit administration for self-funded clients. Previously, Johnson developed expertise in sales and marketing at Leo Burnett Company and served as a broker development sales leader in ancillary insurance.

Outside of work, Johnson enjoys sailing, spending time at the beach, and playing competitive pickleball along the shores of Lake Michigan.

Dallas Scrip, President & CEO, Marpai

Dallas Scrip is an accomplished healthcare industry leader with over 16 years of experience in Third-Party Administration (TPA) services. He is currently the Chief Operating Officer (COO) and President of MarpaiRx at Marpai, Inc., a leader in innovative healthcare technology and TPA services. In this role, Dallas plays a key part in advancing Marpai's operational excellence and accelerating its profitable growth in the rapidly evolving healthcare space.

Before joining Marpai in June 2025, Dallas served as President of TPA Services and Chief Delivery Officer at Centivo, where he was instrumental in enhancing the company's health plan experience for self-funded employers. At Centivo, he was responsible for overseeing the full spectrum of plan implementation, member enrollment, claims review, and vendor integration, all while focusing on client satisfaction and operational efficiency. His work at Centivo further solidified his reputation as a leader capable of driving strategic transformations in healthcare.

Dallas has held key leadership positions at several prominent organizations. Prior to Centivo, he was a key figure at ValueHealth Benefit Administrators, where he led the TPA business and risk/captive unit, successfully improving operational performance in claims processing, call center metrics, and financial outcomes. He also served as Senior Vice President of Business Development at Benefit Management and as a benefits consultant at Gallagher Benefits Services, specializing in cost containment strategies.

With a passion for transforming the healthcare industry, Dallas is a strong advocate for member-centric solutions. He is deeply aligned with companies that aim to disrupt the traditional healthcare model, as seen in his work at Centivo, where he was dedicated to providing affordable, high-quality healthcare through innovative plan designs.

Dallas holds a Bachelor of Arts in Public Affairs Journalism from The Ohio State University and a Master's degree in Liberal Arts and the Social Sciences from Baker University. He is an active speaker at industry conferences, including those hosted by the Self-Insurance Institute of America (SIIA) and the Health Care Administrators Association (HCAA). He is also a member of the Zelis Executive Council and a former President of the Wichita Area Benefit Professionals.

10:00 – 11:00 AM **FIDUCIARY GOTCHAS AND THE COMPANY YOU KEEP**

Presented by: Ron E. Peck, Chief Legal Officer, The Phia Group, LLC

Ron E. Peck has been a member of The Phia Group's team since 2006. As the Chief Legal Officer at The Phia Group, Ron has been an innovative force in the drafting of improved benefit plan provisions, handled complex subrogation and third-party recovery disputes and healthcare direct contracting, and spearheaded efforts to combat the steadily increasing costs of healthcare.

Considered to be not only one of the nation's top ERISA lawyers, Attorney Peck is also viewed as one of the nation's premier self-funded health plan consultants and health benefits attorneys; lecturing at and participating in many industry gatherings including but not limited to The National Association of Subrogation Professionals ("NASP") Litigation Skills Conference, Society of Professional Benefit Administrators ("SPBA"), the Health Care Administrators Association ("HCAA"), the Health Plan Alliance, the Self-Insurance Institute of America ("SIIA") and SIIA's Government Relations Committee. Ron is also frequently called upon to educate plan administrators and stop-loss carriers regarding changing laws and best practices. Ron's theories regarding benefit plan administration and healthcare have been published in many industry periodicals and have received much acclaim. Prior to joining The Phia Group, Ron was a member of a major pharmaceutical company's in-house legal team, a general practitioner's law office, and served as a judicial clerk.

Attorney Peck obtained his Juris Doctorate from Rutgers University School of Law and earned his Bachelor of Science degree in Policy Analysis and Management from Cornell University. Attorney Peck now serves as The Phia Group's Chief Legal Officer.

11:00 AM –12:00 PM BEYOND THE SPREADSHEET: REIMAGINING RENEWALS AND BROKER COLLABORATION IN THE SELF-FUNDED ERA

Presented by: Sonny Huynh, Area Assistant Vice President, Gallagher Benefit Services; Steve Rasnick, Past President, 90 Degree Benefits-Florida; moderated by Julie Wohlstein, President, Centrix Benefit Administrators, Inc.

Sonny Huynh, Area Assistant Vice President, Gallagher

Sonny is a dynamic and results-driven professional who brings a wealth of expertise to his role as an Area Assistant Vice President at Gallagher. With over 18 years of experience in consulting clients across various industries, including real estate, automotive, payroll, HR, PEO, and telehealth, Sonny has consistently delivered exceptional solutions and exceeded client expectations.

Prior to joining Gallagher, Sonny served as the Director of Sales for First Stop Health, where he successfully led sales efforts in California, Arizona, and New Mexico. His strategic vision and leadership skills were instrumental in driving revenue growth and establishing First Stop Health as a trusted provider in the telehealth industry.

Sonny's educational background includes a BS in Physical Therapy from Bowling Green State University in Ohio. This unique blend of healthcare knowledge and business acumen allows him to approach client challenges with a holistic perspective, ensuring comprehensive and effective solutions.

Originally hailing from Australia, Sonny's global perspective and cultural diversity enrich his interactions with clients and colleagues alike. Outside of work, Sonny is an avid tennis player and a passionate traveler, always seeking new experiences and embracing different cultures.

Steve Rasnick, Past President, 90 Degree Benefits-Florida

Mr. Rasnick's broad insurance background includes previous positions as President of Gem Insurance Company, President of Foundation Health National Life Insurance Company, managed care organizations covering more than 800,000 members; Chairman of ProAmerica, a national PPO organization; President of The Travelers Plan Administrators, the third largest national benefits administrator, covering more than 1,000,000 members; President and founder of Claims Administration Services Inc., at the time, the largest TPA in Illinois.

He has over 35 years of employee benefit experience, having held senior level consulting positions with Reed Stenhouse, a division of Alexander & Alexander in Chicago, as well as having provided insurance consulting services to more than 300 groups in Illinois.

Mr. Rasnick is a founding Director of the Self Insurance Institute Of Illinois, participated on the Steering Committee that drafted the Illinois TPA Licensing Regulations, is a past Director and Officer of the Self Insurance Institute of America, and has served on the boards of numerous insurance, managed care organizations, community hospitals and venture capital organizations.

Mr. Rasnick became a full-time resident of Naples, Florida in 1995, where he established a TPA to serve the interests of small to medium Florida employers. He was elected President of the Southwest Florida Association of Health Underwriters in 1998 and President of the Health Care Administrators Association (HCAA) in 2016. He is a graduate of Roosevelt University, attended John Marshall Law School, is a Fellow of The International Claims Organization and is a frequent national speaker on benefit issues, managed care, Consumer Directed Healthcare, self-funding, the development of Community Based and Provider Sponsored Health Plans, third party claims administration, Accountable Care Organizations and GASB.

Julie Wohlstein, President, Centrix Benefit Administrators, Inc.

Julie Wohlstein brings over 40 years of comprehensive experience in business operations and employee benefits administration. She currently serves as President and CEO of Centrix Benefit Administrators, where she leads the strategic direction and operational management of the firm.

Before joining Centrix, Julie held progressively senior roles with several large Third-Party Administrators (TPAs), where she gained deep expertise in benefits administration, compliance, and client services. Her career also includes tenure in the Employee Benefits Consulting and Brokerage Division of Mercer, a global leader in health and benefits advisory.

Julie earned her undergraduate degree in Gerontology from Ohio University and holds a Master of Advanced Studies (M.A.S.) in Leadership of Healthcare Organizations from the University of California, San Diego (UCSD) School of Medicine, where she also completed a Healthcare Executive Leadership Certificate program.

Julie currently serves on the Board of Directors for the largest regional hospital system in Southern California, as well as one of its San Diego-based hospitals, where she chairs the Quality and Safety Committee. She is a licensed insurance broker, a Certified Self-Funded Specialist (CSFS), and a member of the Board of the Health Care Administrators Association (HCAA), where she is a Past President.

Above all, Julie is most proud of her role as a mother to seven wonderful children.