

EXCELLENCE UNDER PRESSURE

REGISTER TODAY!

February 22–24, 2027 | San Antonio | #HCAAExecForum

SCHEDULE-AT-A-GLANCE

Monday, February 22, 2027

1:00 PM – 5:00 PM	REGISTRATION
4:30 PM – 5:30 PM	FIRST-TIME ATTENDEES RECEPTION
5:30 PM – 7:00 PM	WELCOME RECEPTION

Tuesday, February 23, 2027

7:00 AM – 8:00 AM	BREAKFAST & NETWORKING
8:00 AM – 8:30 AM	WELCOME AND OPENING REMARKS
8:30 AM – 9:30 AM	PRESSURE CREATES OPPORTUNITY: WHAT GREAT LEADERS DO DIFFERENTLY



What separates leaders who thrive under pressure from those who simply manage through it? With more than 30 years of experience leading growth and transformation across the aviation industry, Stephanie Chung shares lessons on navigating change, building high-performing teams and creating opportunities in challenging environments.

Drawing on insights from her bestselling book, *ALLY Leadership: How to Lead People Who Are Not Like You*, and her experience leading major aviation companies, she'll offer practical perspectives on how executives can strengthen their organizations, inspire their people and deliver results when the stakes are high.

Presented by: Stephanie Chung, an advisory board member for XTI Aerospace and the former Chief Growth Officer for Wheels Up.

9:30 AM – 10:00 AM	BREAK
--------------------	-------



The economics of self-funded health plans are shifting faster than most employers—and many TPAs—are prepared for. GLP-1 medications like Ozempic, Wegovy, and Zepbound have moved from emerging trend to immediate financial disruptor in just a few renewal cycles, creating sustained, high-cost claims that behave very differently from traditional catastrophic events. What was once episodic risk is becoming a broad, persistent exposure.



At the same time, stop-loss carriers are rapidly recalibrating. Some are carving out GLP-1 weight-loss claims entirely—leaving employers with 100% of the cost—while others are increasing attachment points, tightening underwriting assumptions, and applying targeted lasers to members already on high-cost therapies. Behind the scenes, carriers are also intensifying claim reviews and redefining what “manageable risk” looks like in a pharmacy-driven world. For TPA executives, this convergence is no longer just a pharmacy issue—it’s a multi-dimensional challenge spanning stop-loss strategy, plan design, underwriting credibility, and client trust. In Mercer’s 2026 Health & Benefits Strategies Survey, 77% of large employers report that managing GLP-1 costs is a top priority—yet many lack a coordinated approach to do so.



Presented by: Katherine Lurk, Vice President of PBM and Clinical Programs, Northwind Health Company and Susan Walker, Senior Vice President, Employee Benefits, and moderated by George Stiles, President & COO, Planned Administrators, Inc.

11:00 AM – 12:00 PM

STOP LOSS CARRIERS 5C FOCUS: CLAIMS, CAPACITY, CYCLES, CAPTIVES AND COMPETITION



Stop loss is the financial backstop that makes self-funding work, and it is in one of the hardest markets in years. High-dollar claims are rising in both frequency and severity, medical trend has outpaced what carriers priced for, and reinsurers and some carriers are pulling back capacity. For TPA executives, the result is tougher renewals, more difficult client conversations and growing pressure to show plan sponsors that self-funding still delivers. This candid one-on-one interview offers a rare view into how stop loss carrier leadership sees the market. Jay Ritchie, president of Tokio Marine HCC Life, a national provider of stop loss for the self-funded community, will share his perspective on:

- Where the market sits in the stop loss pricing cycle, and what it will take for conditions to turn
- The claim drivers carriers are watching most closely, including cell and gene therapies, GLP-1s and other specialty drugs, and catastrophic claims for infants and young children
- How shrinking reinsurance capacity, carrier exits and new entrants are reshaping competition, and the outlook for captives

Attendees will leave understanding what matters most to carrier leadership, what keeps one of the industry's most recognized stop loss leaders up at night and how to position their organizations and clients for the renewals ahead.

Presented by: Ernie Clevenger, President of MyHealthGuide Newsletter and Jay Ritchie, President & CEO, Tokio Marine HCC Life

12:00 PM – 1:30 PM

LUNCH

1:30 PM – 2:30 PM

HOW TO DRAMATICALLY INCREASE TPA REVENUE WITHOUT INCREASING PRICES OR YOUR MARKETING BUDGET



In an increasingly commoditized TPA market, competing on price, network, or administrative capabilities alone makes sustainable growth difficult. The TPAs that separate themselves are not necessarily spending more on marketing. They are creating stronger relationships, communicating their value more effectively, and systematically turning their existing network into a growth engine.

Presented by: Jack Hawthorne, Chief Revenue Officer, Waive Administrators

2:30 PM – 3:00 PM

BREAK

3:00 PM – 3:45 PM

CELL & GENE THERAPY: SEPARATING HYPE FROM REALITY AND PREPARING SELF-FUNDED PLANS FOR THE NEXT WAVE OF CATASTROPHIC CLAIMS



Cell and gene therapies are transforming healthcare, offering potentially life-changing treatments for rare and complex conditions. However, with treatment costs frequently exceeding \$2 million to \$5 million per patient—and some therapies approaching \$10 million—the financial implications for self-funded health plans have become impossible to ignore.

While headlines often focus on the price tag, plan sponsors, TPAs, brokers, consultants, and their vendor partners are left asking more practical questions: How likely are these claims to occur? Which therapies pose the greatest risk? What is coming next? And what strategies can be implemented today to protect self-funded plans from catastrophic financial exposure?

Join Brenda Cordell, Senior Healthcare Consultant with Milliman, for a practical and data-driven discussion that separates perception from reality. Attendees will gain insight into the current cell and gene therapy landscape, emerging treatment trends, expected claim frequency, and the evolving risk-financing solutions available to help self-funded plans prepare for the future.

Presented by: Brenda Cordell, Senior Healthcare Consultant, Milliman

3:45 PM – 4:30 PM

BREAKING OUT OF AUTOPILOT: THE PSYCHOLOGY OF BETTER DECISIONS



In this engaging and interactive presentation, Guy uses real-world examples, audience participation, and insights from psychology and human behavior to demonstrate how often we operate on automatic assumptions and routines. Attendees will learn practical strategies to become more intentional, aware, and effective in their decision-making and communication.

Presented by: Guy Bavli, Mentalist, Psychic Entertainer, Master of the Mind, Mind Entertainer, or Kinetic Man

4:35 PM – 5:30 PM

POUR IT FORWARD: LESSONS IN MENTORSHIP, GROWTH, AND THE ART OF WINE (AN EMERGING LEADERS SESSION)



Alpana Singh's path to the top of the wine world started at a restaurant hostess stand, where she found a field that brought together her love of geography, history, and food. Mentors helped her along the way, and she has since mentored dozens of wine professionals who have gone on to their own success.

In this interactive session, Alpana pairs her personal story with practical lessons for every stage of a career. She'll share how small, everyday mentoring moments can matter as much as formal programs, and how organizations can spot, develop, and keep talent in a competitive market. She'll also explain why a pay-it-forward culture leaves a lasting legacy. Along the way, attendees will taste a selection of wines from Texas Hill Country as Alpana explains what makes each one distinctive. Attendees will leave with fresh ideas for growing their careers and the people around them, plus a little more confidence in their own palate.

Presented by: Alpana Singh, Wine Expert, TV Personality and Restaurateur

4:35 PM – 5:30 PM

SPONSOR SESSION 1

4:35 PM – 5:30 PM

SPONSOR SESSION 2

5:30 PM – 5:35 PM

EMCEE WRAP-UP AND NOTICES

5:30 PM – 7:00 PM

CONTINUED CONNECTIONS RECEPTION

Wednesday, February 24, 2027

7:30 AM – 8:30 AM

BREAKFAST & NETWORKING

8:30 AM – 9:30 AM

THE NEW CLAIMS BATTLEGROUND: DENIALS, APPEALS, PROVIDER CHALLENGES, IDR, AND AUDIT DISPUTES



Claims administration has become one of the most heavily scrutinized functions in self-funded healthcare. TPAs and plan fiduciaries are facing increasing challenges related to adverse benefit determinations, provider appeals, compliance requirements, Independent Dispute Resolution (IDR), and retrospective claim audits. At the same time, providers are becoming more aggressive in challenging payment decisions and asserting legal standing to pursue appeals and litigation.



This session will explore the evolving legal and operational landscape surrounding claims disputes and provide practical guidance for TPAs, brokers, plan sponsors, and industry partners. Participants will gain insight into current regulatory expectations, common compliance pitfalls, provider strategies, and best practices for defending plan decisions while maintaining fiduciary and operational integrity.

Presented by: Julie Wohlstein, President, Centrix Benefit Administrators, Inc. and Ed Bolton, CEO, NEXUS

9:30 AM – 10:00 AM

BREAK



The One Big Beautiful Bill Act will remove roughly \$911 billion from Medicaid over the next decade. Combined with six-month eligibility redeterminations and new work requirements for adults 19 to 64, the law is projected to cost more than 10 million people their coverage. For self-funded plans, this is not a distant policy debate but an emerging claims event. Because Medicaid is the payer of last resort, members who lose eligibility shift onto the commercial plan as the primary payer, often mid-year and outside any budget or renewal assumption.

This panel moves past the national headlines to examine what the Medicaid cliff means for plan financial performance, client advisory relationships and administrative strategy. A government programs expert, a stop-loss carrier and a benefits broker will bring three distinct vantage points to:

- The financial exposure the Medicaid cliff creates for self-funded plans, and why traditional renewal cycles fail to surface it
- How coordinating benefits with SSDI, Medicare, VA and dual eligible programs can reduce high-cost claims while improving member coverage
- The compliance and reputational guardrails leaders need in place before they act

Attendees will leave with a clear view of the risk, the strategic levers already available to them and a practical first step to position their organizations, and their clients, ahead of the shift.

Presented by: Frank Cardenas, CEO & Co-Founder, FEDlogic; Justin Truckenbrod, Executive Vice President & Partner, Lockton; Byron Way, President & CEO, Way Specialty Insurance; Simone Wilkinson, Executive Director, Employee Benefits, Leavitt Great West Insurance

11:00 AM – 12:00 PM

WHAT WOULD YOU DO? THE POWER OF MAKING A DIFFERENCE.



In a world where our decisions and actions can have a profound impact on others, what does it truly mean to do the right thing? Drawing from his acclaimed television series *What Would You Do?*, John Quiñones shares powerful stories of everyday heroes like you, who choose to speak up, take action, and make a difference. John will celebrate the often unrecognized but extraordinary role of those making a difference and an impact in the lives of others. Through compelling real-life examples, humor, and inspiration, John reminds us it's about the choices we make, the people we serve, and the difference we have the power to make every day.

Presented by: John Quiñones, ABC News Veteran, Creator & Host, *What Would You Do?*

12:00 PM – 12:15 PM

CLOSING REMARKS AND WRAP-UP
