



# SHOW ME THE MONEY

*4th Annual Health Plan Management Conference*

BIG SKY, MONTANA  
JUNE 22—24



## *Who Should Attend*

*HR Professionals, CEOs & CFOs of employer sponsored self-funded health plans*

*Trustees of multi-employer health trusts and trustees of Taft-Hartley Plans*

*Insurance Committee Members — School, City and County Plans*

*Fiduciaries and key decision makers of large health plans*



*“A conference with all amenities and up to date  
knowledge at its best”*

*–Nicolai Cocergine*

*Chairman of Montana Retail Store Employees Health & Welfare Trust*

## *Greetings from Leavitt Great West Insurance Services,*

*2014 marks the fourth year that our company will be hosting our Health Insurance Conference in Big Sky, Montana. 2013 was a year of massive change in our industry and we are finding that the ACA (aka ObamaCare) is driving business decisions—some we envisioned and others we did not anticipate. That said, 2013 was a year where health insurance expertise was valued at an all time high.*

*We are very proud to have helped launch the MT Health Coop (MHC) and the National Alliance of State Health Coop's (NASHCO), Montana's exchange rates for the products offered on the Exchange are about half of what the same products cost in our neighboring states – we think this is because there is competition in our state.*

*This year's conference is titled Show Me the Money. What our clients are telling us time and again is “please help us find ways to reduce the spend in our health plans”. We have been and continue to be committed to that initiative. You will find that the speakers at this years conference will provide insights and strategies to do just that.*

*Sincerely,*

*Jim Edwards, Partner, Leavitt Great West Insurance Services*

*P.S. Space is limited, so please reserve your spot today!*



# Agenda

## Sunday, June 22rd

6:00–9:00 pm

**Welcome Reception Drinks & Hors d'oeuvres**

Lone Peak Pavilion

---

## Monday, June 23th

7:30–8:00 am

**Continental Breakfast—Registration**

Summit Upper Lobby

8:00 –8:10 am

**Welcome and Introduction**

Jim Edwards, Partner, Leavitt Great West Insurance Services

Talus Room

8:10– 9:30 am



**Mathew Augustine**

CEO

Hanna Global Solutions

*“Technology and Healthcare, where we have been and where we are going”*

The historical development of employee benefits administration technology has changed drastically, from the advent of the web to the era of the online market place. Mathew will discuss the effect of Healthcare Reform on benefits technology and the opportunities it offers all participants in the eco-system – employees, employers, insurance vendors and benefit advisors – will be discussed. The presentation will highlight the various components of benefits technology that are coming together to drive improved efficiencies, reduce costs or increase revenue for these constituents.

9:30–9:40 am

**Break**

**9:40-11:00 am**



**Matt McCuen**

Senior Executive and Partner  
Group Pension Administrators Inc.

***“A 1,000 Dollar Toothbrush”***

For over a decade, Preferred Provider Networks (PPN's) have been one of the primary sources for employers to rely on to reduce their health care costs. However, with the dramatic markup of health-care services at the provider level, negotiating discounts off of services marked up 300% is no longer effective. During this session we will introduce a creative and rapidly growing trend in the way that self-funded employer plans are paying for healthcare, on a CostPlus basis.

**11:00 – 11:10 am**

**Break**

**11:10-12:30 pm**



**Bill Drew**

Principal and Partner  
LHD Benefit Advisors

***“Montana domiciled cell-captives -- how they can work for your organization”***

Captives allow businesses the multiple advantages of retaining underwriting profits, fine tuning risk management while also providing for superior tax efficiency. When a captive can offer protection to third parties, whether they are customers or employees, the captive insurance company can also serve as a profit center to the organization.

Bill will provide insights on captives and share examples of captive leveraged business strategies. Through an exploration of their opportunities and challenges, Bill will explain how companies just like yours are leveraging captives to improve efficiencies and take the edges off of everyday business challenges.

**12:30 pm – (pick up sack lunch)**

**Open for Afternoon Activities**

*Golf, Zip Line, Ride the Lone Peak Tram*

**7:00– 9:00 pm**

**Networking Dinner**

*Peaks*



# Agenda *(Continued)*

**Tuesday, June 24th**

**7:30–8:00 am**

## **Continental Breakfast**

*Upper Summit Lobby*

**8:00–9:00 am**

## **Health Care Panel**

*Talus Room*

This panel session will cover issues ranging from ObamaCare and its impact on these plan sponsored health trusts to enterprise risk and population health management.



**Connie Welsh**  
*Director of Benefits,  
Montana University System*

Connie Welsh has run both the State of Montana and the Montana University System Health Trusts. These are the largest and second-largest health plans in the state of Montana. Both plans are fully self-funded so the strategies that have been employed, mostly developed by Connie and her team, have helped hold down costs to plan participants as well as to the State and the University System. Connie has been an innovator and thought leader not only here in the State of Montana but nationally by her peers. Connie's current role is director of benefits for the Montana University System.



**Monica Lindeen**  
*Commissioner of Securities and Insurance,  
Montana State Auditor*

Monica Lindeen is in her second term as Montana's Insurance Department Commissioner and has served on numerous national committees, through her membership in the National Association of Insurance Commissioners (NAIC), she has played an important role in the development of the Montana Health Insurance Marketplace. In 2015, Monica will become the president of the NAIC.



**Richard Miltenberger**  
*Partner,  
Leavitt Great West*

Richard Miltenberger began his insurance career working for a large Third Party Administrator in the Southeast and then moved on to work for the William M. Mercer Organization in Chicago, United Healthcare and finally ended up in Montana after accepting a position with Blue Cross Blue Shield of Montana as the Vice President of Marketing and later became the Vice President of Underwriting. In 2006 Richard came on board with Mountain West Benefits, now Leavitt Group, and in 2010 took on a partnership with Jim Edwards. Richard was involved with the founding of the Montana Health Cooperative and also the National Alliance of State Health Cooperatives.



**Steve Turkiewicz**  
*CEO Montana Bankers Association (MBA), on MBA and Board Member,  
Montana Association of Health Care Purchasers (MAHCP)*

Steve Turkiewicz has been involved in managing multi-employer health insurance trusts for over 20 years. He began his involvement as the Executive Director of the Montana Automobile Dealers Association. Steve works with Trustees throughout the state of Montana in managing an eight million dollar health insurance plan. Over the past 10 years, Steve has been the President of the Montana Bankers Association.

**9:00-9:10 am**

**Break**

**9:10-10:30 am**



**Jim Edwards**

Partner  
Leavitt Great West Insurance Services, Inc.

*“Money Ball—How to play the game and make your health plan dollars count”*

Managing large employer sponsored health plans in the new era of no annual or lifetime limits is a more daunting task than it’s ever been. Understanding the healthcare delivery system, how to navigate it and how to contract into the health care system for the betterment of your health plan, is paramount to managing any large health plans spend.

Imagine running your business without the benefit of knowing where or why you were spending money; every month you simply get a report showing you incurred \$50,000 of expenses or \$100,000 of expenses, and that this amount is due and payable. It would be impossible to make changes, to reallocate resources, or to fix or even find the problem areas.

**10:30-10:40 am**

**Break**

**10:40-12:00 pm**

**Speaker TBD**

*Topic TBD*



# The Venue

## The Summit Hotel

located in beautiful Big Sky, Montana

With 145 beautifully appointed guest rooms, an on-site activity planning company, sumptuous dining, and a substantial list of services & amenities, Big Sky Resort truly is the premier choice in Montana resorts. The area hosts many of the most beautiful golf courses in Montana.

*Please join us on June 22<sup>nd</sup>–24<sup>th</sup>*

*Sunday, June 22<sup>nd</sup>*

**4:00–6:00pm** – Registration Opens

Lone Peak Pavilion

**6:00–9:00pm** – Hosted Welcome Reception

Lone Peak Pavilion – Drinks & Hors d'oeuvres





# Nightly Rates

## The Summit at Big Sky

<i>Guests per Room</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>
<b>Studio</b> (1-2 guests)	\$169	\$169		
<b>2-Queen Hotel</b> (2-4 guests)	\$189	\$189	\$199	\$209
<b>1-King Hotel</b> (2-4 guests)	\$199	\$199		
<b>1-Bedroom Suite</b> (2-6 guests)	\$239			
<b>2-Bedroom Suite</b> (4-6 guests)	\$329			
<b>3-Bedroom Suite</b> (6-8 guests)	\$409			



## The Village Center at Big Sky

<i>Guests per Room</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>
<b>Studio</b> (1-2 guests)	\$169	\$169		
<b>1-Bedroom Suite</b> (2-6 guests)	\$249			
<b>2-Bedroom Suite</b> (4-6 guests)	\$339			
<b>3-Bedroom Suite</b> (6-8 guests)	\$419			



## Reservations

Call Big Sky Central Reservations at (800) 548-4486 and refer to the Leavitt Great West meeting. Please make your reservation by May 20 in order to receive the special group rates. A deposit equal to one night's lodging is required when making the reservation. Any individual room canceled within thirty days of arrival will forfeit one night's deposit.

*\*prices do not include 17% tax & service fees*



# Free Time Activities



## Golf

Combine classic links-style golf and the stunning natural beauty of Big Sky country to witness a golf experience like no other – the scenic 18 hole par 72 golf course at Big Sky Resort. The Arnold Palmer course is 6,500 feet above sea level, offering longer drives and spectacular views! The cost is \$72 per person.



## Ride the Lone Peak Tram

Take the Tram to the top! The ultimate scenic view and high point of your summer is at the top of Lone Peak in Big Sky, Montana. Take this chance for an experience of a lifetime to stand at an 11,166 ft. summit and view two national parks, three states and many mountain ranges. While we take in the views keep an eye out for Billie and Nanny Goats that call Lone Peak home. The cost is \$79 per person.



## Zip Line

Have you ever wanted to sail through the trees like an Ewok or sparrow? Then come ride the zip line! After getting geared up at Basecamp and a short hike, you will zip through the trees and across the middle road. Continue to the second zip line where you will fly 525 feet through the Moose Tracks forest. The third and final line will zip you across the gully so close to trees you can reach out and grab them if you want. The cost is \$79 per person.



# 2014 Registration

## SHOW ME THE MONEY

*4th Annual Health Plan Management Conference*

### *Registration Fees:*

**Register by May 23** to receive the early bird rate of \$295

After May 23, the rate increases to \$350

Registration Cancellation Policy: Full refund less a \$25 cancellation fee is available until June 2.  
No refunds are available after June 2.

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

Email \_\_\_\_\_

Organization Representing \_\_\_\_\_

**Please return your  
registration form to**

Show Me the Money  
380 Ice Center Lane, Ste C  
Bozeman, MT 59718

Toll Free: 888.995.3088  
Fax: 406.587.2451

**Or register online at:**

[www.mtnreg.com/LeavittShowMe](http://www.mtnreg.com/LeavittShowMe)

***Sponsored By:***





3390 Colton Drive, Suite A  
Helena, MT 59602

Place  
Stamp  
Here

*Address Here*

# SHOW ME THE MONEY

*4th Annual Health Plan Management Conference*