



December 6, 2023
Austin, Texas

2023 PBGH Summit

Affordability Through Accountability:
Bridging the Health Care Value Chasm

AGENDA

12:30 – 1:00 p.m. CT

Non-Member Registration

1:00 – 1:10 p.m. CT

Opening Remarks

Aldy Duffield, Apple
Senior Manager, Healthcare
PBGH Board Chair

Elizabeth Mitchell, PBGH
President and CEO

1:10 – 1:40 p.m. CT

Keynote | Taking Back Healthcare: The Imperative for Employers to Act Now

Dr. Rushika Fernandopulle, Iora Health
Co-Founder and Former CEO

1:40 – 2:40 p.m. CT

Fireside Chat | Achieving Affordability Through Accountability

Moderator: Stacey Richter, Aventria Health Group
Co-President
Podcast Host, *Relentless Health Value*™

Celine (Cannizzaro) Orsini, GEICO and Berkshire Hathaway
Head of Health and Wellness, GEICO
Head of Pharmacy Healthcare Strategy, Berkshire Hathaway

Greg Marchand, The Boeing Company
Director, Global Benefits

Elizabeth Mitchell, PBGH
President and CEO

Nate Murray, Crossover Health
Founder, Chief Revenue Officer

2:40 – 3:00 p.m. CT

Networking Break

| | |
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| <p>3:00 – 3:50 p.m. CT</p> | <p>CAA as an Enabler for Marketplace Change</p> <p>Moderator: Alan Gilbert, PBGH Vice President, Policy</p> <p>Julie Selesnick, Berger Montague Senior Counsel</p> <p>Karen Handorf, Berger Montague Senior Counsel</p> <p>Jamie Greenleaf, Fiduciary in a Box Co-Founder</p> <p>Jeff Hogan, Upside Health Advisors President</p> |
| <p>3:50 – 4:40 p.m. CT</p> | <p>PBGH Strategies and Solutions to Get to Value</p> <p>Moderator: Randa Deaton, PBGH Vice President, Purchaser Engagement</p> <p>Linda Brady, The Boeing Company Value-Based Care Portfolio and Network Strategy Manager</p> <p>Michael Costello, NextEra Energy, Inc. Benefits Director</p> <p>Rob Paczkowski, eBay Inc. Senior Director, Global Benefits</p> <p>Lisa Woods, Walmart Vice President, Physical and Emotional Wellbeing</p> |
| <p>4:40 – 4:50 p.m. CT</p> | <p>Annual PBGH Moonshot Awards</p> <p>Moonshot Awards Selection Committee</p> |
| <p>4:50 – 5:00 p.m. CT</p> | <p>Closing Remarks</p> <p>Michael Costello, NextEra Energy, Inc. Benefits Director PBGH Board, Membership Committee Chair</p> <p>Randa Deaton, PBGH Vice President, Purchaser Engagement</p> |
| <p>5:00 – 7:00 p.m. CT</p> | <p>Moonshot Awards Networking Reception</p> |

**Scan the QR code to the right to
access PBGH Summit resources.**



FEATURED SPEAKERS



Jed Cohen

Co-Founder, Fiduciary In A Box

Jed is a serial entrepreneur whose career has spanned multiple industries including technology, the performing arts and non-profit. In 2009 Jed launched RocketHub.com, one of the world's first crowdfunding platforms, with the aim of empowering people through access to capital. Jed and his team scaled RocketHub to become one of the largest crowdfunding platforms in the world and enabled independent artists, entrepreneurs and scientists to raise millions of dollars to complete passion-projects. RocketHub was acquired in 2015. From there, Jed moved into health-tech, helping to scale Outcome Health past a \$5 Billion valuation, before becoming the COO of Venture for America, a national non-profit dedicated to developing the next generation of entrepreneurs. Jed is now Co-Founder and COO of Fiduciary In A Box, helping employers to quickly and easily establish a well-documented fiduciary process for the management of their health plans.



Dr. Rushika Fernandopulle

Co-Founder and Former CEO, Iora Health

Dr. Rushika Fernandopulle is a practicing physician who was the co-founder and former CEO of Iora Health, an early innovator in Primary Care redesign. Iora was acquired by One Medical, and then the combined company was acquired by Amazon. Rushika is now on a career break to figure out his next chapter. Prior to this, Rushika was the first Executive Director of the Harvard Interfaculty Program for Health Systems Improvement and Managing Director of the Clinical Initiatives Center at the Advisory Board Company. He is a member of the Albert Schweitzer, Ashoka, Aspen and Salzburg Global Fellowships, and is co-author or editor of several publications including *Health Care Policy*, a textbook for physicians and medical students, and *Uninsured in America: Life and Death in the Land of Opportunity*. He serves on the staff of Massachusetts General Hospital, on the faculty of Harvard Medical School and on the board of Families USA. He earned his A.B., M.D. and M.P.P. from Harvard University, and completed his clinical training at the University of Pennsylvania and Massachusetts General Hospital.



Jamie Greenleaf

Co-Founder, Fiduciary in a Box

Jamie Greenleaf is the Co-Founder of Fiduciary In A Box (FIAB). She has spent her entire career acting in a fiduciary capacity, helping employers design and implement retirement programs to create better outcomes for employees. In 2019, Jamie founded TILT, a health plan technology and consulting firm, to help employers fulfill their fiduciary obligations by controlling cost and providing better health benefits. In 2020, after the Consolidated Appropriations Act (CAA) was signed into law, Jamie co-founded Fiduciary In A Box to support employers and their partners to establish the foundation and framework of a fiduciary process and

mitigate the risk for the plan sponsors. Jamie is a Specialty Leader (Health Care Plan specialization) with the Center for Board Certified Fiduciaries™ (CBCF), a group of fiduciary experts selected for their skills, best practices and knowledge. She is regularly invited to speak at industry conferences, is a sought-after presenter for many continuing education sources, such as Pensions and Investments, HR.com and SHRM University Conference Services, and is an adjunct lecturer in the Plan Sponsor University certification program for UCLA's Anderson School of Business-Executive Education.



Karen Handorf

Senior Counsel, Berger Montague

Karen L. Handorf is Senior Counsel and Member of Employee Benefits and ERISA practice group at Berger Montague. Karen represents the interests of employees, retirees, plan sponsors, plan participants and beneficiaries in employee benefit and ERISA cases in the district court and on appeal. Ms. Handorf brings four decades of ERISA knowledge to Berger Montague's practice, where she focuses on emergent issues in health care – particularly on the actions of insurance carrier TPAs that exercise fiduciary duties under ERISA-covered health plans. Karen advises employers and

other plan sponsors on the provisions in their administrative service agreements that might cause them to unwittingly violate ERISA or other employee benefit laws. Karen is also focused on other legal violations related to patient health care under other (non-ERISA) federal statutes and state consumer statutes in her efforts to address exorbitant health care costs.

Prior to joining Berger Montague, Karen was a partner at another prominent plaintiffs' class action firm and the immediate-past chair and then co-chair of that firm's Employee Benefits/ERISA practice group, where she led efforts in identifying, litigating and when necessary, appealing often novel employee benefits issues. Prior to that, Karen had a distinguished career in government service. She spent 25 years at the Department of Labor (DOL), where, among other senior positions, she was the Deputy Associate Solicitor in the Plan Benefits Security Division. During her tenure at the DOL, Karen played a major role in formulating and litigating the Government's position on a wide variety of ERISA issues, from conception through expression in amicus briefs filed by the United States Solicitor General in the U.S. Supreme Court.



Jeff Hogan

President, Upside Health Advisors

Jeffrey Hogan is the President of Upside Health Advisors, a national consultancy providing advisory services to payers, providers, health systems, employers and health-tech point solutions. Jeff also serves as an advisor to private equity, family offices and directly to health startups looking to position themselves into the health care marketplace. Jeff is focused on health care payment reform, health policy, care transformation, the Consolidated Appropriations Act of 2021, value-based health care, health care quality and precision medicine. Prior to his role at Upside, Jeff served as the Northeast Regional Manager for Rogers Benefit Group, a national benefits marketing and consulting firm. He retired from Rogers Benefit Group in 2021 after 30 years with the company. Jeff regularly appears on national forums focused on moving to value-based health care and is actively working to promote health care related transparency measures in the market.



Nate Murray

Founder and Chief Revenue Officer, Crossover Health

Nate Murray is a founder of Crossover Health and the chief revenue officer (CRO). He is an entrepreneur with a strong passion for health care and more than 20 years' experience in the industry. He works closely with the procurement, finance and benefits design teams to ensure administrative and financial compliance of the health services implemented. Nate also helps to develop shared savings programs that align incentives across the partnership, and deliver objective improvements along the cost, quality and experience dimensions. He is a strong advocate of plan designs that make primary care, mental health and physical medicine low cost or no cost for members.

Nate has been employed by several large health care payers in operations and product development, and has experience in partner and consumer marketing, call center operations and strategic planning. He has also worked in health care technology, helping payers and consumers understand and make important decisions based on costs. Prior to founding Crossover, Nate led the development of a direct-to-consumer Medicare marketing program and building of a large online Medicare broker partner network. Nate earned his Bachelor of Arts degree in Economics from the University of Utah and holds a Master of Business Administration degree from Brigham Young University. He lives in Laguna Niguel, California, with his wife and sons.



Stacey Richter

Co-President, Aventria Health Group

Podcast Host, *Relentless Health Value*™

For more than 25 years, Stacey Richter has innovated health care solutions that are win-wins for those who deliver or pay for health care and, most of all, the patient.

As a recognized top 10 health care influencer, Stacey uses her voice and thought leadership to provide meaningful insights and inspiration for those looking to do right by patients. This includes physicians and other clinicians, population and public health leaders, health-tech entrepreneurs, insurance carriers and plan sponsors.

Much of Stacey's expertise can be categorized into two main areas. First, she has spent years studying and testing ways to close the gap between clinical knowledge and standardized practice. Second, she has done extensive work identifying and communicating best practices for value alliances and collaborations among health care stakeholders. The overarching goal of Stacey's work is to help align efforts to deliver higher-quality care, support better patient experience, reduce overall costs and decrease the amount of burned-out clinicians.

Stacey is the host of *Relentless Health Value*™, the largest podcast for senior executives at health care organizations. She is co-president of Aventria Health Group, a well-known innovative consultancy working with large, self-insured employers as well as pharmaceutical, medical device and other health care clients. She is also co-president of QC-Health®, a benefit corporation dedicated to overcoming care gaps for patients by helping PCPs and specialists work together. Stacey studied economics at the University of Pennsylvania, the Wharton School and the University of Stockholm.



Julie Selesnick

Senior Counsel, Berger Montague

Julie S. Selesnick is Senior Counsel in Healthcare and Employee Benefits Groups at Berger Montague. Julie Selesnick has over twenty years of experience litigating in complex dispute resolution forums representing both plaintiffs and defendants in state and federal courts throughout the United States. Julie also has a wide variety of arbitration and mediation experience, including as first chair in both jury and bench trials, and has represented some of the largest companies in the U.S. as well as small companies, labor

unions, individuals and classes of plaintiffs.

Julie's current practice is a mix of class action litigation on behalf of individuals, union funds and employers, and a growing consulting practice working with self-funded health plans and service providers to health plans, including but not limited to advising on ERISA and other regulatory compliance issues, drafting and negotiating service provider contracts, NDA/Confidentiality and BAA agreements, negotiating on behalf of health plans or brokers with third-party administrators to gain access to plan claims data as well as the terms of provider

agreements related to payment and assisting plans and service providers with a variety of other issues related to the new disclosure requirements under the Consolidated Appropriations Act of 2021, such as drafting for vendors and assisting plan fiduciaries in obtaining 408(b)(2)(B) compensation disclosures, advising on and drafting MHPAEA NQTL comparative analysis reports, negotiating access to RxDC submissions made by TPAs and PBMs on behalf of plans and finding and removing gag clauses from administrative service contracts.

PBGH MEMBER SPEAKERS

Linda Brady

VBC Portfolio and Network Strategy Manager The Boeing Company



Boeing is the world's largest aerospace company and leading manufacturer of commercial jetliners, defense, space and security systems and service provider of aftermarket support. Linda is a member of Boeing's Health Care and Well Being Strategy team, managing their health care analytics and provider network strategy. In her role, Linda manages the overall portfolio of Boeing's Value Based Care (VBC) direct-contracting initiatives, from the initial design/concept, through contract development,

implementation and sustainment. She has over 20 years of experience in the health care industry, studied at the University of Illinois and is a Six Sigma Green Belt. Prior to Boeing, she was a consultant at two of the leading health benefits consulting firms, where she advised large complex organizations on their health care benefits strategy, including direct contracting arrangements, TPA integration, ACO implementations and health care analytics.

Celine (Cannizzaro) Orsini

Head of Health and Wellness, GEICO Head of Pharmacy and Healthcare Strategy, Berkshire Hathaway



Celine (Cannizzaro) Orsini serves as Head of Health and Wellness for the Government Employees Insurance Company (GEICO), with responsibility for the company's Health and Wellness strategy and well-being of its more than 37,000 associates. Celine also serves as Head of Pharmacy and Healthcare Strategy for Berkshire Hathaway, GEICO's parent company.

Prior to joining GEICO in 2021, Celine spent time at Haven and Headspace, Inc., where she was Head of Channel Partnerships. She has also held Regional Vice President of Sales roles at Sword Health and TRUVERIS, in addition to various roles with CVS Health and CVS Caremark. Celine is passionate about going beyond standard health care to bring care to people in every corner of the country and the world, regardless of their socioeconomic status, by identifying, solving and preventing unnecessary complexities in our current health care system. She earned her Bachelor's of Fine Arts in Photography from Parsons Paris and a fine arts degree in Photography, with a minor in Foreign Languages, from Loyola University Maryland.



Michael Costello

Benefits Director, NextEra Energy, Inc.

Michael Costello is Benefits Director for NextEra Energy, Inc. In this role, he is responsible for managing medical and pharmaceutical benefits for NextEra Energy and its many subsidiaries. Michael joined NextEra Energy, Inc. in 2020.

Prior to joining NextEra Energy, Michael was responsible for continued development and maintenance of a hospital system-wide workers compensation medical service program for Tenet. The service offering enabled claim handlers to efficiently

manage claims, align specialty physicians and ancillary services in a cost-effective and measured outcome-based manner. The program surpassed 20,000 coordinated medical cases a year under his direction. Prior to Tenet, he held an Executive Director of Operations position at One Call Care management, overseeing and developing the ancillary programs for employers and injured employees within the workers compensation insurance line. Early in his career, Michael served as a managing partner with Outback Steakhouse, achieving Managing Partner of the Year multiple times during his career with the company. He is also a recipient of the Nassau County's Small Businessperson of the Year award for the community service support he provided while residing on Long Island, New York.

Michael earned his Bachelor of Science degree from Niagara University in Buffalo, New York. His studies provided him with specialization in Business Management, with emphasis in hospitality and the transportation industry. Michael resides in West Palm Beach, Florida, with his beloved wife and their three children. His oldest son serves in the U.S. Armed Forces.



Aldy Duffield

Senior Manager, Healthcare, Apple

Aldy Duffield is a global benefits leader, currently working at Apple managing U.S. Healthcare Programs and transformative initiatives on global health. She also leads a focused effort to integrate Apple's inclusion and equity values across benefit programs. Aldy has been with Apple since 2013 and her focus is to lead U.S. Healthcare that enables consistent thinking in how Apple supports health care for their employees and families globally. Aldy is passionate about driving innovation and inspiring Apple's health partners to be disruptive and integrated

in the marketplace, enabling enterprises to demand change in how health care is delivered.

Prior to joining Apple, Aldy's 25 years of HR and Benefits experience included senior global leadership roles at Dell, Electronic Arts, Cisco Systems and Oracle Corporation. Aldy lived abroad in the U.K., managing international benefits and has traveled to over 30 countries. Aldy is on the Board of Directors for Purchaser Business Group on Health and American Benefits Council. Aldy is a member of the Washington, D.C.-based Business Group on Health and supports various institutes within BGH, including Global Business Group on Health. Aldy was one of the founding members of the Silicon Valley Employer's Forum (SVEF) in 1994 with now over 35 high-tech employers. Aldy is based in Austin, Texas.

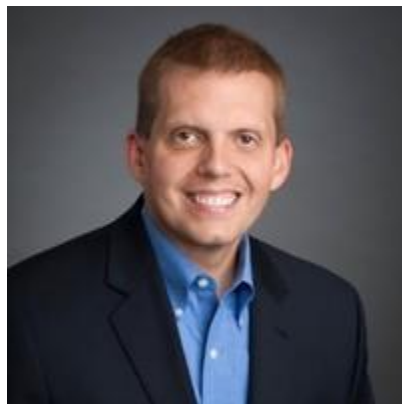


Greg Marchand

Senior Director, Global Benefits, The Boeing Company

Greg is currently responsible for developing Policy, Strategy and ensuring Compliance of Boeing's Global Benefit Programs. Formerly he was responsible for the Human Resources component of mergers, acquisitions and divestitures for Boeing Commercial Airplanes. Previously he served as the Senior Manager of Health and Welfare Operations. In this capacity, Greg had oversight responsibility for Boeing's health and welfare carriers in the areas of performance management, rate renewals and quality and was responsible for implementing Boeing's Health and Welfare outsourcing strategy.

In addition, Greg as the Boeing representative on the Washington Health Alliance and ERISA Industry Committee Board of Directors, was formerly on the Boards of the Purchaser Business Group on Health and The Leapfrog Group. Greg holds a Bachelor of Arts in Economics from Hiram College and a Master of Science in Health/Fitness Management from the American University. Prior to joining Boeing, he served as a consultant to the Kellogg Company and the W.K. Kellogg Foundation.



Rob Paczkowski

Senior Director, Global Benefits, eBay Inc.

Rob Paczkowski has 30 years of experience in employee benefits. Specialty areas include health and welfare, wellness work/life, time off, international benefits and retirement benefits strategy, design and administration. Prior to eBay, Rob worked for several organizations, including most recently, Google and Capital One. Areas of focus include value-based health care/direct contracting, transparency efforts, data analytics and a comprehensive high-value health care strategy. In addition, Rob was an early pioneer in developing

autism benefits and helping other employers implement those programs for their employees. Rob also has a passion for health care public policy and is active with the American Benefits Council and the PBGH public policy leadership groups. Rob now lives in San Jose, California with his wife Connie and 16-year-old son Jason. Rob also has two adult daughters and two dogs named Tuff and Angus.



Lisa Woods

Vice President, Physical and Emotional Wellbeing Walmart

Lisa Woods serves as Vice President, Physical and Emotional Wellbeing for Walmart Stores, Inc. Lisa is a benefits professional with broad-based knowledge and has been recognized nationally as an innovator and thought leader in health care with a strong commitment to ensuring that more than a million Walmart associates have access to benefits that are comprehensive, affordable and competitive. Lisa has played a key role in developing a portfolio of innovative programs focused on payment reform, reducing waste in the system and ensuring the appropriateness of care for Walmart associates. Lisa led the effort with her team to design and implement the Centers of Excellence program for heart, spine, joint replacements and cancer with leading quality health systems. Lisa has also worked on developing narrow network plans focused on quality, including direct contracting with ACOs.

Walmart was presented with the 2019 Helen Darling Award for Excellence in Health Care Value and Innovation by the National Business Group on Health for efforts to improve the health care delivery system. In addition, Lisa was named to Fortune magazine's World's Greatest Leaders (#10) in 2019 as a result of her efforts, and most recently, she was awarded the 2020 Top 25 Health Care Innovators. Lisa serves on many committees and boards, including board chair for the Purchaser Business Group on Health (PBGH), board vice president for the Council of Employee Benefits, several National Business Group on Health (NBGH) affiliated committees, Leapfrog and the Catalyst for Payment Reform (CPR).

PBGH STAFF SPEAKERS



Won Andersen

Chief Operating Officer Purchaser Business Group on Health

Won Andersen serves as PBGH's Interim Chief Operating Officer. Won has over 30 years of business and leadership experience growing successful consulting practices in the human capital, health, benefits and wellbeing space. Prior to PBGH, she was the West Region Practice Leader for several large consulting firms responsible for growth, transformation and culture of the health practice serving 500+ clients. Responsibilities included developing creative and innovative solutions, building intellectual capital, recruiting, cultivating and developing talent and solving complex problems for clients ranging from Fortune 1,000 to emerging markets. She brings deep expertise and knowledge of the commercial markets, plan sponsors, carriers, health systems, HMOs, PBMs and specialty point solutions vendors. Won has served clients in multiple sectors for both private and public entities. Won holds a Bachelor of Arts degree from Bowdoin College in Brunswick, Maine.



Randa Deaton

Vice President, Purchaser Engagement Purchaser Business Group on Health

As Vice President of Purchaser Engagement, Randa Deaton leads the PBGH Member Value team to engage purchasers in high-impact solutions to improve health care quality, affordability and equity. Prior to joining PBGH, Randa served as the President and CEO of the Kentuckiana Health Collaborative (KHC), bringing more than 17 years of experience working directly with health care purchasers. She led the Corporate Community Health Initiative as part of the benefit strategy team for Ford Motor Company from 2004 to 2020.

In her previous roles, Randa led the development of Kentucky's first multi-payer primary care quality and public reporting, the Kentucky Core Healthcare Measures (KCHMS) and the KCHMS purchaser priority measurement set. She also launched the Healthcare Equity Advisory Committee. Randa served as Vice Chair of the National Alliance of Healthcare Purchaser Coalitions, Advisory Board Member of the University of Louisville's School of Public Health and Information Sciences Advisory Board and Taskforce Member of the National Quality Forum's (NQF) Driving Value through the Next Generation of Quality. Randa earned her bachelor's degree in psychology from Indiana State University and her master's in industrial and organizational psychology from Middle Tennessee State University.



Darren Fogarty

Associate Director, Purchaser Value Purchaser Business Group on Health

As Associate Director of Purchaser Value, Darren Fogarty directs PBGH's initiative to leverage newly available public data on health care price and quality to support members in meeting and taking advantage of their enhanced fiduciary obligations under the 2021 Consolidated Appropriations Act (CAA). Prior to joining PBGH, Darren worked for ethical and transparent health care benefits consulting firms in business development, financial analytics and strategic advising roles. He also worked for eight years at a nonprofit in Washington, D.C. called the Institute for the Fiduciary Standard, where he now serves on the Board of Directors. Darren founded and led the Committee for Fee-Only Benefits Advisors, a not-for-profit group of health care industry leaders who advocate for fiduciary principles and transparent compensation between benefits consultants and their employer clients.

Darren holds a Master of Environmental Management (MEM) with a concentration in economics and policy from Duke University and a Bachelor of Arts in Economics from the University of North Carolina at Greensboro.



Alan Gilbert

Vice President, Policy

Purchaser Business Group on Health

As Vice President of Policy, Alan Gilbert works directly with PBGH members to prioritize and advance important strategic, legislative and regulatory efforts that improve health and health care for America's workers and their families. He has extensive experience working across all aspects of the U.S. health care system to improve health outcomes and reduce costs. Alan previously served in senior executive roles at Anthem, Inc. and GE, where he led efforts on the social determinants of health

and designed multi-sectoral programs to improve health and reduce costs with community leaders, health systems, employers, governments and national and local philanthropies. He has also worked at the highest levels of the federal government as a chief counsel in the U.S. Senate, in legislative affairs at HHS and as the health policy advisor in the White House for President George W. Bush. Alan holds a J.D. from Louisiana State University Law School and a degree in International Trade and Finance from Louisiana State University. He is based in Washington, D.C.



Elizabeth Mitchell

President and CEO

Purchaser Business Group on Health

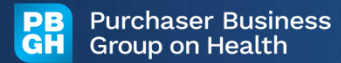
As President and CEO, Elizabeth Mitchell advances PBGH's strategic focus areas of advanced primary care, functional markets and purchasing value. Mitchell leads PBGH in mobilizing health care purchasers, elevating the role and impact of primary care, and creating functional health care markets to support high-quality affordable care, achieving measurable impacts on outcomes and affordability. At PBGH, Elizabeth leverages her extensive experience in working with health care

purchasers, providers, policymakers and payers to improve health care quality and cost.

She previously served as Senior Vice President for Healthcare and Community Health Transformation at Blue Shield of California, during which time she designed Blue Shield's strategy for transforming practice, payment and community health. Mitchell also served as the President and CEO of the Network for Regional Healthcare Improvement (NRHI), a network of regional quality improvement and measurement organizations. She also served as CEO of Maine's business coalition on health (the Maine Health Management Coalition), worked within an integrated delivery system (MaineHealth), and was elected to the Maine State Legislature, serving as a State Representative. Elizabeth served as Vice Chairperson of the U.S. Department of Health and Human Services Physician-Focused Payment Model Technical Advisory Committee, Board and Executive Committee Member of the National Quality Forum (NQF), Member of the National Academy of Medicine's "Vital Signs" Study Committee on core metrics and a Guiding Committee Member for the Health Care Payment Learning and Action Network. Elizabeth holds a degree in religion from Reed College and studied social policy at the London School of Economics.

2023 PBGH Summit

*Affordability Through Accountability:
Bridging the Health Care Value Chasm*
December 6, 2023



PLATINUM SPONSORS

Tamar Rudnick

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apree health brings together a best-in-class engagement platform with an advanced primary care model to provide a vastly better health and care experience, improve outcomes and significantly lower the total cost of care for a population. Its proven solutions are built on a robust data and technology foundation that provides a rich understanding of each person, a navigation experience that engages individuals in their health and care and an integrated care team that manages the individual's whole health. apree health partners with top U.S. employers, leading provider groups and some of the country's largest, most progressive health plans.

Melissa Alford

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Astellas Pharma US, Inc. is a U.S. affiliate of Tokyo-based Astellas Pharma Inc., a pharmaceutical conducting business in more than 70 countries around the world. Astellas stands on the forefront of health care change to turn innovative science into value for patients. Keeping our focus on addressing unmet medical needs and conducting our business with ethics and integrity enables us to improve the health of people throughout the U.S. and around the world. For more information on Astellas, please visit: <https://www.astellas.com/us>. You can also follow us on Twitter at @AstellasUS, Facebook at www.facebook.com/AstellasUS or LinkedIn at www.linkedin.com/company/astellas-pharma-us.

Tom Leahy

Director, Business Development

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For over 8 years, Color has worked to improve population health outcomes where traditional care cannot. We partner with leading organizations to deliver care where life happens — offering convenient care solutions for millions. Color has partnered with the American Cancer Society to offer a comprehensive Cancer Prevention and Screening Program designed to address the rising cancer cost crisis. Built to support populations at scale, the program drives member engagement, completion of screening-to-care and offers pre- and post-diagnosis support to drive better health outcomes for employers.

Nathan Murray

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Crossover Health is a leader in value-based hybrid care. Their national medical group delivers – at scale – advanced primary care, driven by an interdisciplinary team including primary care, physical medicine, mental health, health coaching, occupational health and navigation. With a focus on wellbeing and prevention, Crossover builds trusted relationships with its members and provides flexible care in person, online and anytime.

Joe Holloran

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Sharecare is the leading digital health company that helps people – no matter where they are in their health journey – unify and manage all their health in one place. Our comprehensive and data-driven virtual health platform is designed to help people, providers, employers, health plans, government organizations and communities optimize individual and population-wide well-being by driving positive behavior change. Driven by our philosophy that we are all together better, at Sharecare, we are committed to supporting each individual through the lens of their personal health and making high-quality care more accessible and affordable for everyone.

GOLD SPONSOR

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finHealth's AI-enabled health care analytics solution provides timely and actionable insights to prevent erroneous payments, drive cost savings and quality improvements, while simultaneously upholding your fiduciary duties to plan members. finHealth has 500,000+ lives on the platform with 10 million claims analyzed annually. We achieve 4:1 hard dollar ROI across our book of business. finHealth works closely with innovative self-funded employers to drive superior plan performance, and is the only unbiased, independent data analytics firm that addresses ALL forms of health care waste: errors, improper billings, high-cost claims and poorly negotiated contracts.

SILVER SPONSORS

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Covera Health is the leading AI-enabled diagnostic technology company focused on radiology performance measurement and impact. Working with some of the nation's largest payers and health systems, Covera Health serves as the industry's first two-sided marketplace to drive quality performance and ensure patients receive the highest quality radiology care. By unlocking AI-powered insights and value to support the broader health care ecosystem, Covera Health enables payers, providers and other stakeholders to leverage diagnostic imaging in new ways to transform patient care.

Daniel Shields

Ochsner Health Vice President

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Ochsner Connected Health is applying technology and data to create customized, patient-centered Digital Medicine solutions for chronic condition management. We've pioneered a true clinical model that includes medication management by licensed clinicians. We're enabling members to improve their health and patient experience, while improving employer population and reducing costs.

Mike Casarella

Senior Director,

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Spring Health is a comprehensive mental health solution for employers and health plans. Unlike any other solution, we use clinically validated technology called Precision Mental Healthcare to pinpoint and deliver exactly what will work for each person — whether that's meditation, coaching, therapy, medication and beyond. Today, Spring Health supports over 4,500 organizations, from startups to multinational Fortune 500 corporations, and is a preferred mental health provider to companies like General Mills, Bain and DocuSign. For more information, please visit www.springhealth.com.

John Davis

Chief Commercial Officer

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Twin Health is a virtual metabolic health partner that combines patented Whole Body Digital Twin technology and a compassionate team of licensed providers to prevent, improve and reverse metabolic diseases like obesity, pre-diabetes and type 2 diabetes. Twin Health uniquely addresses the root cause of metabolic disease. This results in healthier, happier members and significant cost savings. Twin Health's employer partners see a 72% reduction in GLP-1 costs, while maintaining a member NPS of 90. Twin is working with two PBGH members to deploy Twin to address the rising GLP-1 cost wave. We welcome the opportunity to share more.

Renzo Luzzatti

President

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US-Rx Care is a Fiduciary Pharmacy Risk Management Company that provides independent utilization management services for large employers and health plans that want to keep their PBM but remove the conflicts of interest associated with utilization management and dispensing from the PBM's mail and specialty pharmacies.

BRONZE SPONSORS

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AbbVie is a large biopharmaceutical manufacturer based in North Chicago, IL. AbbVie's mission is to discover and deliver innovative medicines and solutions that address complex health issues and enhance people's lives.

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AiRCare is a next-generation behavioral health care company. Through heart and science, we're removing the obstacles to employee emotional and physical wellbeing in ways never seen before. Our members engage in treatment at 10 times the average rate, and over 60% maintain their emotional and physical health beyond one year. For our employer partners, we're driving down their total health care costs dramatically and positively impacting employee job performance. Our 17 years of clinical experience have taught us that technology helps, but human connection heals. We believe that together we can revolutionize the health and happiness of individuals, families and entire communities.

Savannah Quarum

Managing Director

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www.audxguard.com

Audxguard, a WellRithms company, was established in response to the 2023 Consolidated Appropriations Act amendments, focusing on gag clause prohibitions. Our mission is to assist employers in navigating these evolving Department of Labor reporting requirements. We offer services for identifying problematic language within plan documents, comprehensive auditing of medical claims data from as far back as December 2020 and the development of proactive health plan fiduciary best practices. Unlock a new level of health care compliance and empower your employee benefits program with Audxguard.

Scott Liebman

President

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BenefitBump is a benefit plan optimization program for employers. We help maximize the impact of the benefit plans, leave programs and worksite supports employers offer to help their growing families thrive. BenefitBump connects employees with Care Navigators, who are master's level social workers, trained to be experts in our clients' benefit plans and leave programs. We provide participants with the personalized, emotional-health forward support they need to address the key stressors in their lives. Clients that implement BenefitBump have higher new parent retention, fewer premature births and happier employees and benefits teams. To learn more, visit www.benefitbump.com or email info@benefitbump.com.

Laurel Pickering

Director, Strategic Growth Development

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www.centivo.com

Centivo is an innovative health plan for self-funded employers, with a mission to bring affordable, high-quality health care to the millions of workers who struggle to pay their medical bills. Anchored around a primary care-based Accountable Care Organization (ACO) model and fully integrated with one of the nation's first virtual primary care practices to receive Patient-Centered Medical Home (PCMH) Recognition by the National Committee for Quality Assurance (NCQA), Centivo typically saves employers 20% or more compared to traditional U.S. insurance carriers. Employees also realize significant savings through its free primary care, predictable copays and no-deductible benefit plan design. Centivo partners with mid-sized organizations to the Fortune 500.

Jon Montanaro

Senior Vice President Employer Sales

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310-259-7323

www.galileo.io/employers

Galileo is the modern, medical practice of the future – serving patients where they can best be cared for: in the office, home or virtually. Founded by Dr. Tom Lee, a primary care internist and pioneer in the field of clinical practice design, quality and affordability, Galileo focuses on improving the quality of care for diverse and complex populations.

Ramona Farris

Employer Partnership Lead

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www.modernatx.com

In over 10 years since its inception, Moderna has transformed from a research-stage company advancing programs in the field of messenger RNA (mRNA), to an enterprise with a diverse clinical portfolio of vaccines and therapeutics. Moderna maintains alliances with a broad range of domestic and overseas government and commercial collaborators, which has allowed for the pursuit of both groundbreaking science and rapid scaling of manufacturing. Moderna's mRNA platform builds on continuous advances in basic and applied mRNA science, delivery technology and manufacturing, and has allowed the development of therapeutics and vaccines for infectious diseases, immuno-oncology, rare diseases, cardiovascular diseases and auto-immune diseases.

Merrie Kay Alzola, BPharm

Employer Account Manager, Obesity Care

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www.novonordisk.com/changingobesity

Obesity is a serious, chronic disease that has a profound impact on individuals, families and health care systems and affects over 110 million adults in the U.S. People living with this disease face discrimination and stigma, and few health care professionals are trained in providing obesity care. Although many people with obesity believe they should be able to manage their weight on their own, science shows that after losing weight, the body tries to put it back on by slowing down metabolism and increasing appetite signals. As part of our long-term commitment to improve the lives of people with obesity, Novo Nordisk is partnering to change how the world sees, prevents and treats obesity. Learn more at novonordisk.com/changingobesity.

Thomas Jough

National Director, Employers

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www.pfizer.com

Technology is not only changing our lives, but also revolutionizing human health. By uniting transformational technology and cutting-edge science, Pfizer is pioneering biopharmaceutical innovations that not only treat difficult diseases—but can cure or prevent them. Every day, Pfizer is working to discover breakthroughs that change patients' lives and open new worlds of medical possibilities. We're applying equal intelligence and passion to help ensure these treatments and therapies are accessible to all. Pfizer is amplifying the power of science and technology, daring more courageously and inquiring more deeply to make what was once unimaginable a reality.

Ed Daley

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www.pelagohealth.com

Pelago, formerly Quit Genius, is the world's leading virtual clinic for substance use management. We are transforming substance use support – from prevention to treatment – delivering education, management skills and opportunities for positive change to members struggling with substance use, most commonly tobacco, alcohol, or opioids. Our solution gives employers the means to offer on-demand, personalized support to workers seeking to live healthier lives. Pelago's cognitive behavioral therapy (CBT) and medication-assisted treatment (MAT) programs deliver convenient, accessible and effective support that seamlessly integrates with health plans, pharmacy benefit managers and wellness platforms. To date, Pelago has helped more than 750,000 members manage their substance use and improve their lives. Visit www.pelagohealth.com for more information.

Blair Smith

Vice President

913-200-8550

www.rxss.com

Rx Savings Solutions works with health plans, Medicare plans and self-funded employers to help plan members navigate the pharmacy benefit for the lowest-cost prescriptions. Currently serving 18 million lives, the company provides the market-leading pharmacy transparency solution that combines patented technology, proactive member engagement and concierge support.

Matt Hodes

Vice President of Sales

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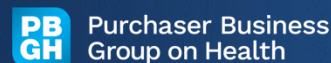
www.visanahealth.com



Visana's virtual women's health clinic offers full-service clinical care for the widest range of women's health conditions. Our 50-state provider practice allows Visana OBGYNs to prescribe medications and practice medicine.

2023 PBGH Summit

*Affordability Through Accountability:
Bridging the Health Care Value Chasm*
December 6, 2023



ATTENDEE LIST

| Name | Title | Company |
|--------------------|--|--------------------------------------|
| Abbie Yant* | Executive Director | San Francisco Health Service System |
| Amy Green | Vice President, Global Benefits | Dell |
| Alan Gilbert | Vice President, Policy | Purchaser Business Group on Health |
| Aldy Duffield | Senior Manager, Healthcare | Apple |
| Alice Williams | Vice President of Employer Sales | Embold Health |
| Alix Leonard | Benefits Analyst | Apple |
| Amanda McCullough | Vice President, Benefits | Salesforce |
| Anna Quarum | Chief Operations Officer | Audxguard |
| Amy Palmer | Senior Benefits Analyst | City of Colorado Springs |
| Ardena Layne | National Director | Pfizer, Inc. |
| Barbara Wachsman | Senior Advisor | Frazier Partners |
| Blair Dudley | Director, Transform Maternity Care | Purchaser Business Group on Health |
| Brian Wenner | Vice President, National Accounts | Quantum Health |
| Britt Soriano | Strategic Accounts Director | Spring Health |
| Brooke Ossenkop | Vice President, Demand Generation | Virgin Pulse |
| Catherine Jacob* | Benefits Program Manager | Salesforce |
| Celine Cannizzaro | Head of Health & Wellness/ Head of Pharmacy & Healthcare Strategy | GEICO/ Berkshire Hathaway |
| Chris Chan | Strategic Advisor | finHealth |
| Chris Skisak | Executive Director | Houston Business Coalition on Health |
| Christine Wheeler | Vice President, Head of Benefits & Well-being | JPMorgan Chase & Co. |
| Christopher Koller | President | Milbank Memorial Fund |
| Cody Adams | US Rewards Partner | Genentech |
| Corinne Piazza | Corporate Account Executive | Merck & Co., Inc. |
| Crystal Eubanks | Vice President, Care Transformation | Purchaser Business Group on Health |
| Dan Shields | Vice President | Ochsner Health |
| Dana Erdfarb | Executive Director, Benefits | Morgan Stanley |
| Dane Guarino | Chief Executive Officer | EmsanaCare |
| Dariusz Mydlarz | Chief Medical Officer | GE Appliances, a Haier company |
| Darnell Butler | Strategic Sales Associate | Pelago |
| Darren Fogarty | Associate Director, Purchaser Value | Purchaser Business Group on Health |
| David Linquist | National Director, Managed Markets | Astellas Pharma Inc. |
| David Thomas* | Employee Benefits Director | State of Colorado |
| Denise Giambalvo | Director, Member Engagement | Washington Health Alliance |
| Derek Moore | Vice President, Sales | Sharecare |
| Don Moulds, PhD | Chief Health Director | CalPERS |
| Donna Church | Director, Health Benefits & Delivery | GE Appliances, a Haier company |

*Virtual Attendee

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| Name | Title | Company |
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| Drew Oliveira | Executive Director | Washington Health Alliance |
| Elizabeth Mitchell | President and Chief Executive Officer | Purchaser Business Group on Health |
| Frederick Brown | Employer Team Principle National Account Executive | Genentech |
| Gaby Foley* | Principal Risk Manager | Amazon |
| Gillian Printon | Strategic Growth Leader | Centivo |
| Greg Green | Director, Business Development | Memorial Sloan Kettering Cancer Center |
| Gregory Marchand | Director, Global Benefits | The Boeing Company |
| Humberto Leandro | Benefits Leader | Tesla |
| Iftikhar Hussain* | Chief Financial Officer | San Francisco Health Service System |
| Jaclyn Wainwright | Chief Executive Officer | AiRCare Health |
| Jamie Greenleaf | Co-Founder | Fiduciary in a Box |
| Jane Lee Choe | Senior Vice President Enterprise Sales | Parsley Health |
| Janna Wilson | Benefits Sourcing Manager | King County, WA |
| Jason Parrott | Senior Vice President | Vida Health |
| Jay Boatman | Regional Account Executive | Novo Nordisk |
| Jed Cohen | Co-Founder | Fiduciary in a Box |
| Jeff Hogan | Upside Health Advisors | President |
| Jeff White* | Director, Global Health Care & Well-being | The Boeing Company |
| Jennifer Cressman | Chief Commercial Officer | Form Health |
| Jennifer Stroh | Senior Benefits & Wellness Manager | City of Colorado Springs |
| Jessica Linart* | Director of Insurance | Colorado PERA |
| Jim Arnold | Founder and Chief Executive Officer | finHealth |
| Joe Dunlop | Regional Sales Director | apree health |
| Joe Holloran | Vice President, Sales | Sharecare |
| John Davis | Chief Commercial Officer | Twin Health |
| John Trombello | Regional Sales Director | Rx Savings Solutions |
| Johnny Chang | Senior Manager, UCAN Benefits | Netflix |
| Jon Montanaro | Senior Vice President, Employer Sales | Galileo |
| Josh Meier | Lead Benefits Strategy | AT&T |
| Julee Weller | Director, Global Benefits Design | Intel |
| Julie Selesnick | Senior Counsel | Berger Montague |
| Justin Rutherford | Enterprise Account Executive | Crossover Health |
| Jutta Joesch* | Health Care Economist | King County, WA |
| Karen Handorf | Senior Counsel | Berger Montague |
| Katelyn Johnson | Director, Integrated Health | Cisco Systems |
| Kevin Hurley | Senior Vice President, Sales | Covera Health |
| Kevin Seabaugh | Senior Vice President, Sales | apree health |
| Kimberley Coleman* | Manager, Benefits | Salesforce |
| Laura Kile | Director of Sales | Virta Health |
| Lauren Remspecher | Associate Director, Health Care Benefits Innovation & Member Solutions | Purchaser Business Group on Health |
| Leah Hole-Marshall | General Counsel-Chief Strategist | Washington Health Benefit Exchange |
| Leslie Rife* | Vice President, Global Benefits | Robert Half |

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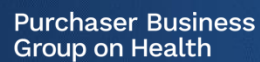
| Name | Title | Company |
|---------------------------|---|------------------------------------|
| Linda Brady | VBC Portfolio and Network Strategy Manager | The Boeing Company |
| Lisa Woods | Vice President, Physical & Emotional Wellbeing | Walmart |
| Lisa Zamosky | Chief Communications Officer | Purchaser Business Group on Health |
| Logan Waterman | Member Program Manager | Purchaser Business Group on Health |
| Lori Magnoni | Director, Market Access | Astellas Pharma Inc. |
| Luke Prettol | Lead Benefits Strategist | AT&T |
| Lydia Walker | Associate Director, IT & Operations | Purchaser Business Group on Health |
| Mahmood Panjwani | Chief Executive Officer | L-NewCo |
| Marianne Fazen, PhD | Executive Director | DFW Business Group on Health |
| Mark Mincy | Executive Vice President | US-Rx Care |
| Mark Simpson | National Account Manager | AbbVie |
| Matt Baldwin | Benefits Program Manager | Google |
| Matt Hodes | Vice President of Sales | Visana Health |
| Melissa Alford | Senior Corporate Account Director | Astellas Pharma Inc. |
| Melissa Real | Director, Benefits | Qualcomm |
| Melody McClain* | Senior Manager, Benefits | Levi Strauss & Co. |
| Merrie Kay Alzola, BPharm | Employer Account Manager | Novo Nordisk |
| Michael Costello | Benefits Director | NextEra Energy |
| Michael Robinson | Affordability Program Manager | State of Colorado |
| Michele Bildner | Project Manager | CDC Foundation |
| Michele Ritala | Benefits Strategy | King County, WA |
| Michelle Clark | Senior Health Services Operations Leader | GE Appliances, a Haier company |
| Milton Ezzard | Vice President, Global Benefits | Activision Blizzard |
| Nancy Jester | Senior Manager of Physical & Emotional Well-being | Walmart |
| Nate Murray | Founder and Chief Revenue Officer | Crossover Health |
| Nathan Counts | AVP – Total Rewards | Amtrak |
| Pablo McCabe | Lead, Sales & Growth | Navigator Healthcare Inc. |
| Patrick Nelli | Chief Executive Officer | Aligned Marketplace |
| Peg Carpenter* | Senior Equity & Quality Improvement Specialist | Covered California |
| Polly Lam* | Benefits Program Manager | Salesforce |
| Rachel Quinn | Principal, Network Strategy | Amazon |
| Ramona Farris | Employer Partnership Lead | Moderna |
| Randa Deaton | Vice President, Purchaser Engagement | Purchaser Business Group on Health |
| Raymond Tsai, MD | Vice President, Advanced Primary Care | Purchaser Business Group on Health |
| Raz Winiarsky, MD | Medical Director | Covera Health |
| Renzo Luzzatti | President | US-Rx Care |
| Rob Paczkowski | Senior Director, Global Benefits | eBay Inc. |
| Ron Vianu | Chief Executive Officer | Covera Health |
| Ruby Gabriel* | Benefits Manager | CSAA Insurance Group |
| Rushika Fernandopulle, MD | Co-Founder and Former CEO | Iora Health |
| Ryan Kline | Associate | Mark Cuban Companies |

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| Samara Bishop | Account Executive | Wellthy |
| Sandra Petrykowski* | Senior Manager, AMER Benefits | Salesforce |
| Sanjay Motwani | General Manager/President | Artemis by Nomi Health |
| Sara Whitley | Employee Retirees Benefits Unit Manager | Washington State Health Care Authority |
| Sarah Moore | Vice President, Business Development | BenefitBump |
| Sarah Portwood | Director Compensation & Benefits | Caltech |
| Savannah Quarum | Managing Director | Audxguard |
| Scott Fillenworth | Chief Revenue Officer | Eden Health |
| Scott Liebman | President | BenefitBump |
| Shelby Kirk | Senior Vice President, Employer & Health Plan Growth, Sales | Kindbody |
| Shilpa Thakar | US SLG/K12 Director, Public Sector | Color Health |
| Shira Berger | Vice President/Lead National Accounts | One Medical |
| Stacey Richter | Co-President/ Podcast Host | Aventria Health Group/ Relentless Health Value |
| Steve Smallidge | Head of Growth | AiRCare Health |
| Steven Halterman | Wellness Manager | State of Colorado |
| Tamar Rudnick | Senior Vice President, Marketing | apree health |
| Tanya Deuel | Employee Retirees Benefits, Section Manager | Washington State Health Care Authority |
| Tom Leahy | Director, Business Development | Color Health |
| Tonya Walker* | Chief Medical Officer | Netflix |
| Vanessa Fiorillo | Regional Sales Director, Public Sector | Rx Savings Solution |
| Won Andersen | Chief Operating Officer | Purchaser Business Group on Health |
| Yatin Mundkur | Chief Executive Officer | Cellworks |

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Group on Health