PROUD RESOURCE PARTNER
MISHRM
MICHIGAN COUNCIL OF SHRM

INVITE US TO YOUR NEXT EVENT

View our list of bold, forward-thinking MISHRM speakers.

Company	Speaker	Person to Contact for Further Inquiries	Topics	Bio
Consumers Credit Union	**Scott Dobson**	Scott Dobson - scott.dobson@consumer-scu.org	Financial Wellness in the Workplace Personal Finance, Credit Score, Debt Reduction Budgeting	Scott Dobson joined Consumers Credit Union as a business services manager in 2007 and transitioned from closing business loans to sharing financial education tips as the Consumers @Work program manager. "About eight years ago, I was asked to revive our Consumers @Work program," Scott explains. "It has grown from an idea to help some businesses employees to an educational program that helps employees get the most from each paycheck they receive. With 20 years of experience helping people with their finances, Scott has all the tools to guide members to a better financial future. "Because I've been working with people and their finances for more than 20 years—from every walk of life—I've seen the struggles a single parent making $10 an hour faces, and I've also seen the struggles of business owners who need $50,000 in cash every week to stay afloat," Scott says. "I can empathize with both, and I think that suits me well for my position at the credit union in helping both large businesses with hundreds of employees—and, at the very same time, helping the one member do his or her best with one paycheck. Being involved in the community is also very important to Scott. He is a member of the Kalamazoo Human Resource Management Association, as well as a former Rotary member. Apart from his community affiliations, bicycling keeps Scott busy in his free time. "I like all things fast!" Scott says. "I've road raced motorcycles in my 20s and 30s at racetracks all over the country and had a great time. I also crashed several times at over 100 mph and written off a couple of very nice motorcycles, so I've switched to riding bycicles. My family has about nine bikes in our garage right now, and I've done the Make-A-Wish three-day 300-mile charity bike ride five times now." With years and years of experience, there is one key piece of advice Scott will always use in his professional and personal life. "The single best piece of advice I ever got was from my Dad. 'Son, it's not what happens, but how you take it that counts,'" Scott recalls. "As I became wiser, I guess, I now know what he means—that your own mental attitude drives where your life is going, and that while things are going to happen no matter what, it's how you handle those things that really has the effect."
Dinsmore	**James Reid**	Dani Godin - Danielle.Godin@DINSMORE.COM	Employment Labor Employment Discrimination Litigation Wrongful Discharge Labor Arbitrations Audits, Counseling & Training Wage/Hour Law Class Action False Claims Act Education Industry International Business NLRB Issues	Whether it's representing clients or playing a game of chess with family, James goes all in strategizing and preparing for possible challenges facing his clients today and months, even years, in the future. He counsels business owners, serial entrepreneurs, C-suite executives, in-house counsel, and human resources directors to make strategic business decisions, from hiring to firing, while complying with the ever changing and overlapping laws, including the ADEA, FLSA, FMLA, NLRA, and Title VII. He brings a business and proactive approach to legal matters to help employers make strategic business decisions to minimize the potential for litigation and business disruption. Clients appreciate James' hands on approach and his ability to learn businesses and tailor his counsel to meet each client's specific needs. Because he puts his name and reputation on every product and decision, he delivers advice to his clients in a no-nonsense fashion, which enables them to make the best decisions with clear and concise guidance. When litigation becomes necessary, he enforces restrictive covenants and defends employers against charges filed with the EEOC, state, and federal agencies. James regularly conducts audits and investigations into employers' wage and hour practices and claims of discrimination and harassment. He provides training and prepares employment documents, including employee handbooks, employment agreements, and separation agreements, to cover all aspects during the life cycle of an employee. Giving 100 percent to everything he does, James is a renowned keynote and national speaker at conferences and events, including the American Payroll Association, SHRM, and HR Day.

Continued on next page

Events North	**Allison Beers**	Allison Beers - allison@eventsnorth.com	Put Your Phone Down: a Serious Yet Humorous Look at Etiquette Meeting Planning Virtual Meeting Planning Event Planning Networking	Events North is a full service meeting and event management agency specializing in corporate events, meetings and incentives. It was started in 2008 by Allison Beers after working for two of the largest event planning agencies in the world. Beers has over 20 years of experience in event management, incentive and meeting planning and marketing. In 2008, she decided to change the conversation when she started Events North. Typical meeting and event management agencies mark up all services and then tack on a planning fee. Allison asked herself, "How can you have an honest conversation about what's most important if the client doesn't really know what the true price is?" Frustrated with the lack of transparency that this archaic industry practice entailed, she started Events North with an open budgeting process plan. Events North prides itself on being ethical, honest and focused on exceeding all expectations. Events North is a Certified Women's Business Enterprise. In 2016, Connect Magazine, a National Meeting Planning publication, named Beers to the top 40 under 40 leaders in the industry. In 2014, Michigan Meetings + Events Magazine inducted Allison into the Hall of Fame for Best Event Planner. Since 2010 Events North was named the Readers' Choice Best of Award Winner from Michigan Meetings + Events Magazine for Best Meeting Planner. Since 2008, the Traverse City Business News named Beers one of the 40 Most Influential Business People under 40... until she aged out 10 years later. In 2017 the Traverse City Business News named Beers one of the 50 Leading Women in Business.
Health Alliance Plan	**Elizabeth Robinson**	Elizabeth Robinson - Erobinso@HAP.ORG	Making Sense of Medicare	Elizabeth Robinson is a licensed and certified health, accident and life insurance agent who has more than a decade of experience in the health insurance industry and is an expert in Medicare and individual/family plans. She is a Medicare Field Agent for HAP whose role empowers her to advocate for her clients and continue to build, bridge and broaden successful relationships with professionals and organizations that serve the Medicare community. Her first-hand experience with her aging parents and working in this industry gives her the empathy needed to effectively work with and serve the ever-growing Medicare-eligible population.
HRPro-BenePro	**Rebecca Dioso** VP HR Consulting, HRPro	Jennifer Wajeeh - jwajeeh@hrpro.com	Employee Communications, Relations and Engagement Managing Performance Succession Planning How to take a small company big time	Rebecca Dioso is an experienced Human Resources leader and Change Management professional. She is the Vice President of Human Resources Consulting for HRPro in Royal Oak, MI. With more than two decades of corporate HR experience at global organizations like KPMG, Oracle, General Electric, Aramark, Schering-Plough (Merck) and Chrysler, as well as very large, privately-held family companies, Rebecca is adept at employee communication and communicating change. She has extensive experience in employee relations, investigations and performance management. Rebecca has created and refined HR processes, including complete deconstruction and rebuilding of human capital management systems, employee benefit offerings, organizational restructurings as well as multiple mergers and acquisitions. Rebecca has a passion for Veterans and has built employment-related outreach activities to ensure that those who served our country transition to civilian employment with ease. Rebecca has both her SPHR and SHRM-SCP certifications. She earned her Master's degree in Industrial Organizational Psychology from the University of Detroit Mercy and her Bachelor's Degree in Psychology and Sociology from the University of Michigan. Rebecca is an active volunteer with Boy Scout Troop 1261 and an Area Representative volunteer with Youth for Understanding. She is a former Member of the Board of the Michigan Diversity Council and is currently the Vice President of the Board for the non-profit Our Community Bridge. In her free time, Rebecca travels globally, visiting her former foreign exchange students located throughout the world.
HRPro-BenePro	**Kris Powell** President/CEO HRPro/ BenePro	Jennifer Wajeeh - jwajeeh@hrpro.com	Employee benefits Creating great corporate culture Building a great team	Kris Powell is the CEO of both HRPro and BenePro. The mission of the two organizations is to help employers take better care of their most valuable asset- their employees. With over 30 years in business, the companies specialize in HR and benefit consulting and administration. They are extremely proud to have been in the Crain's Coolest places to work Top 10 for the last 3 years. A lifelong resident of SE Michigan, Kris is a graduate of Oakland University. He is also a CGN (Certified Golf Nut!) and lives in Troy, MI with his wife, Jennifer. His daughter, Lauren, is a graduate of MSU (GO Green!) and is pursuing her Masters Degree in speech and language pathology at Emerson College in Boston. Kris sits on the Board of Automation Alley, Michigan's Industry 4.0 epicenter. Past boards have included Notre Dame Prep, United Benefit Advisors, and Big Brothers/ Big Sisters.

Continued on next page

Hylant	**Marianne Farley**	Marianne Farley - Marianne.Farley@Hylant.com	Self-funding Basics (Self-funding 101) Self-funding – Beyond the Basics (Self-funding 201)	Industry Experience Marianne serves as a client executive in Hylant's Ann Arbor office in the employee benefits department. She joined Hylant in 2015, after doing business with Hylant for over 20 years. Marianne is responsible for building long-term strategic partnerships with clients and provides highly valued consulting by leveraging a strong knowledge of markets and ensuring compliance amid the vast changes in healthcare legislation and regulations. She also provides guidance on wellness, alternative funding and other emerging health plan trends. Clients and Specialties Marianne's career in employee benefits includes working for insurance carriers, then TPA's, moving next into the consulting end of the business when she joined Hylant. During the more than 30 years in the TPA world, she worked exclusively with large, self-funded groups. This experience provided Marianne with an in-depth knowledge of alternative funding, unique plan designs, data analytics and experience managing health care costs, while balancing employee goodwill. Over the years her clients have been of all sizes, funding types and industries, such as non-profits, financial institutions, large manufacturing companies, many tier 1&2 auto suppliers, large retail firms, IT staffing firms, union and collectively bargained groups, over a dozen hospital clients and several municipalities. Industry Associations Marianne teaches self-funded basic and advanced courses for colleagues, HR professionals, employer groups and CFO's. She is also involved in MI SHRM and for the last 5+ years has served as a Hylant sponsor representative, co-moderating a CFO round-table group. Community Involvement Girl Scouts of Southeastern Michigan (GSSEM) Board member Chairperson, Board Development Committee Cornerstone Schools in Detroit, Michigan Mentor for students, 7+ years Detroit Athletic Club Board Chair, Woodbridge Society Women's Bowling Chair, 2020-2022 Former involvement includes: Big Brothers Big Sisters of Wayne County, Big Sister, 10+ years Boy Scout Leader, Pack 50, Novi, Michigan, 7 years St. James Catholic Church, Novi, Michigan, Religious Ed Instructor, 12 years
Kestly Development	**Mike Kestly**	Mike Kestly - mike@kestlydevelopment.com	Selection - Onboarding - Coaching - Employee Development = The Mixing Bowl of Retention (presented at MI HR Day) Developing a Leadership Mindset with Personal Development The Secret to Great Talent and Teams with Everything DiSC Making Every Hire Count: What Really Matters to the C-Suite How to Build High Performance Sales Teams	Kestly Development helps SELECT, RETAIN and "DEVELOP" your people. Kestly Development provides employee selection tools that are easy to set up and makes the hiring job easier. They also do ""Supervisor Training"" programs that smooth out the hiring process, improve Safety, build great teams, and increase retention. In today's economy, organizations can increase profitability in a couple of ways. First: You have to put the right people in a job that they enjoy, working for a boss that motivates them, and in an organization that they work hard to help grow. Then, an organization can either increase revenue, or reduce expenses to be more profitable... We can help you to do both. Mike Kestly has been doing this for 20-years, shortly after he got his MBA at EMU.
Keyser Insurance Group	**Jenn Olson**, JD	Sonja Burnside - sburnside@keyseragency.com	Compliance and Risk related items	Jenn is a "Staunch Spartan" and graduated from MSU in 2000. Upon obtaining her B.A. in Criminal Justice, Jenn attended The Thomas M. Cooley Law School, obtained her Juris Doctorate, and was admitted to the State Bar of Michigan in 2006. During law school, Jenn moved to Kalamazoo where she has resided for almost 20 years and proudly has 2 children that are future Kalamazoo Public School Promise Scholars. Jenn has over 15 years of legal experience related to e-discovery practice, governmental agency investigations, medical device class-action lawsuits and employment law litigation. Prior to joining Keyser Insurance Group as Vice President of Compliance & Risk Management, Jenn served as a regulatory compliance specialist for one of the world's leading medical technology companies. Jenn is an avid sports fan – Go Green – and greatly enjoys being outdoors and active with her children.
Keyser Insurance Group	**Jeanne Bolhuis** BBA, MPA	Sonja Burnside - sburnside@keyseragency.com	HR related items	Jeanne Bolhuis, Chief Consulting Officer with Keyser Insurance Group, knows that in the world of human resources, being different is what keeps you relevant, so when given the option, she'll always take the road less traveled — and enjoy the journey. Her passion for and career in human resources began as a high school student when she worked as an intern doing recruitment for a temporary agency. She earned her bachelor's and master's degrees from Western Michigan University while working in leadership roles that involved human resources, engagement, process improvement, compliance, operations and more. What really lights her fire is having an impact on people in creative and meaningful ways, and teaching and guiding others to do the same. Over the years — informed by her more than 30 years of experience in HR and the knowledge of the broad impact HR can have on a business those years afforded her — Jeanne began to identify a need among clients and other businesses for human resources support. This inspired her to launch the agency's in-house human resources consulting practice, which offers human resources-related education and training in day-to-day operations, immediate critical needs and long-term strategy, as well as leadership development, team building and more. Through her work she challenges clients to get comfortable with the uncomfortable, and helps them embrace change to get the traction they want. Jeanne speaks on a wide spectrum of human resources-related topics at events ranging from corporate meetings and retreats to industry gatherings and conferences. She considers it a daily privilege to keep the human in human resources.

Continued on next page

Keyser Insurance Group	**Cassie Goodband**	Sonja Burnside - sburnside@keyseragency.com	Employee benefits related items	Cassie Goodband joined the team at Keyser Insurance Group in 2018 after spending more than a decade with a Fortune 500 insurance company, where she was one of its top 100 performers (out of 49,000). Needless to say, Keyser is glad she's a member of their team. While Keyser values Cassie's ability to drive results for the agency, they also value her ability to drive results for clients. Notably, in her time at Keyser, Cassie has brought renewal percentages down almost 290 percent across her book of business, secured $365,000 in carrier credits for clients, and overall reduced client spends by $1.9 million dollars. Keyser hates to brag (not really), but she helped one client reduce its annual prescription benefit spend by $900,000. By the way, she made all this happen by exercising creative solutions, not by sacrificing the quality or breadth of benefits provided to clients' employees. Cassie understands (and helps clients understand) how a great benefits strategy — from plan design to communications to workplace culture — achieves higher perceived value of employee benefits, which leads to a more engaged, profitable workforce for employers. Cassie also focuses on innovation. During the COVID-19 pandemic she's successfully virtually onboarded all new clients, as well as helped existing clients implement virtual benefit decision-making solutions and shift to virtual open enrollment meetings to meet their needs and streamline processes now and in the future. If Keyser had to pick a team member who embodies their Focus on the Client core value, it's Cassie. She is passionate about spending time with clients — current and future — to find out about who they are and what they need, so she can figure out how Keyser can make it happen. When she's not sliding her glory days of Crossfit into her conversations — you know how much Crossfitters love to tell you they Crossfit, even when it's been years since they actually did Crossfit — she's busy parenting a sassy (or shall we say outspoken) six-year-old daughter for whom the hashtag #leadlikeagirl may have been created.
Keyser Insurance Group	**Sonja Burnside**, BBA	Sonja Burnside - sburnside@keyseragency.com	HR related items	Sonja Burnside, Human Resource Generalist with Keyser Insurance Group, is a key player on their HR Consulting team. If HR was baseball, we'd call her a utility player. Because from developing surveys to analyzing their results and presenting to clients, she can do it all (and them some) — and she does it all (and then some) extremely well. Her passion for human resources flourished as she worked her way up the retail management ladder, taking a lagging, low-operating store to a $2 million leader. She obviously knows how to rally a team, but what she loved most about her role as store manager was interviewing and onboarding new employees. While finishing her degree — Sonja holds a bachelor's degree in business administration from Western Michigan University — she worked in administrative roles, providing support at the executive level, which gives her valuable insight into the c-suite psyche. Upon graduation from WMU she joined global specialized staffing firm Robert Half, recruiting candidates for administrative and human resource roles. What Sonja likes best about her role at Keyser is that every day and every client is unique. She also loves that the human resources world is always evolving, which means she's always learning. If you bump into Sonja outside of work, she'll probably be covered in dirt. She enjoys gardening — sunflowers especially — and Jeepin'. It's a thing. She'll tell you all about it. She'll also tell you her favorite place to be in the Jeep is on Northern Michigan's Drummond Island during peak fall color. Though far less dirty than gardening or Jeepin', Sonja also spends time volunteering and is a Big Sister with Big Brothers Big Sisters of Southwest Michigan.
Lighthouse Insurance Group	**Stacey O'Keefe** Vice President & Joe Biermacher, Account Executive - Team Lead	Alexis Holmes - Aholmes@lighthousegroup.com	Employee Time Away from Work (Maternity Leave, Paternity Leave, Infertility Leave, Adoption Leave, EAP)	With over 24 years of employee benefit consulting experience in Eastern Michigan, Stacey O'Keefe specializes in various funding arrangements for mid to large employers. Before joining Lighthouse, Stacey worked as a COO and Managing Partner of a privately held insurance agency for 20 years as well as a Senior Associate of a global consulting firm. In addition to working with her clients, Stacey serves as a Companion Volunteer with Hospice of Michigan.
Lighthouse Insurance Group	**Shamus O'Keefe** Vice President	Alexis Holmes - Aholmes@lighthousegroup.com	Plan Alternatives (Reference Based Pricing, Captives, Plan Designs, Value Based Drugs)	Shamus O'Keefe brings over 26 years of employee benefit experience, including over 15 years with some of the nations top carriers. He is an expert in ancillary products and worksite and leave management. In addition to working with his Lighthouse clients, Shamus volunteers regularly with Special Olympics Michigan.
Lighthouse Insurance Group	**Eve Rogus** Senior Vice President & Stacey Platz, Account Executive - Team Lead	Alexis Holmes - Aholmes@lighthousegroup.com	Employee Engagement (Workforce Re-Engagement, Tools to Connect Employees, Unified Messaging, Changing Message from Financial Report Out to Employee Engagement/Impact)	Eve Rogus has over 30 years of employee benefits consulting experience, working extensively with union and private employers. Her expertise includes reducing employer costs through proper employee engagement. Eve is a member of the National Association of Health Underwriters, West Michigan Association of Health Underwriters, Rotary Club of Grand Rapids, and sits on the Board of Governors at Van Andel Institute.
Lighthouse Insurance Group	**Zach Haan** Senior Account Executive & Anne-Marie Reid, Account Executive - Team Lead	Alexis Holmes - Aholmes@lighthousegroup.com	Voluntary/Additional Benefits (Pet Insurance, Student Loan Forgiveness, Patient Advocacy Models, BTA, Legal, Fertility Treatment, EAP)	With over 15 years of employee benefits consulting experience, Zach Haan is a Senior Account Executive at Lighthouse, an Alera Group Company. He is a member of the West Michigan Association of Health Underwriters, former Agent Advisory Member for Priority Health, and serves as the Treasurer of the Group Health Trust Board of Associated Builders and Contractors. Zach is designated as a Licensed Insurance Counselor.
Lighthouse Insurance Group	**Glen Van De Venter** Senior Vice President & Jessica Proctor, Senior Financial Analyst	Alexis Holmes - Aholmes@lighthousegroup.com	Managing Plan Costs (HCC, Drugs, Transparency Tools, Data Analytics)	Glen Van De Venter, Senior Vice President, has over 26 years of experience consulting on mid to large employer's benefits plans. Glen has extensive experience working with public and private employer benefit plans, as well as union benefit plans. He holds a Bachelor's in Human Resource Management and is a member of the National Association of Health Underwriters and West Michigan Association of Health Underwriters.

Continued on next page

Lighthouse Insurance Group	**Jason Nickel** Senior Vice President & Katherine Johnson, Account Executive	Alexis Holmes - Aholmes@lighthousegroup.com	Well-Being (Physical, Emotional, Financial & Social)	Jason Nickel, Senior Vice President at Lighthouse, has over 20 years of employee benefits consulting experience. Jason's expertise includes well-being program development and the importance of employees' holistic health (financial, social, mental, and physical). Jason holds a Bachelor's of Business Administration and is a member of the National Association of Health Underwriters, West Michigan Association of Health Underwriters, and the Agent Advisory Council for Blue Cross Blue Shield of Michigan.
Lockton Companies	**Eric Hollenbach**	Eric Hollenbach - ehollenbach@lockton.com	Employee Benefits Benefits Administration Payroll Services Human Resources Information Systems	As a Project Manager at Lockton, Eric engages with clients and prospects looking to improve their business by aligning their objectives with HR technology. Whether the client wants to evaluate its current technology or implement new technology, Eric works with the client to ensure it receives the greatest benefit. As a strategic partner, Eric works closely with an organization's HR managers and C-suite throughout the discovery process, RFI and RFP processes, contract negotiations, and implementation. Beyond implementation oversight, Eric is meticulous in confirming service agreements are realized and utilization is effective. Eric is skilled in project management and excels in negotiations and strategic thinking. He is a subject matter expert in employee benefits, benefits administration, payroll services, and human resources information systems (HRIS).
Lockton Companies	**Kelly Reed**	Kelly Reed - kmreed@lockton.com"	Talent Culture Organization Effectiveness	Kelly leads the Talent and Culture service line at Lockton. This practice helps organizations worldwide improve their talent, culture and business outcomes using people data and work science. She also leads the People X Institute at Lockton, which focuses on advancing workplace practices at the community level by fostering mutual learning and growth among HR and business leaders. Prior to joining Lockton, Kelly spent more than a decade with a boutique management consulting firm in a variety of roles, ultimately as Vice President and Market Leader. Kelly serves in various leadership roles for charitable organizations and industry associations in the community. She also presents at conferences and events nationwide on topics related to talent, culture and organization effectiveness. Outside of work, she enjoys spending time with her husband and two daughters and seeing as much of the world as possible through travel. Kelly is a licensed psychologist in Missouri.
Lockton Companies	**Scott Behrens**	Scott Behrens - sbehrens@lockton.com	Employee Benefit Compliance Government Relations	Scott brings more than nine years of legal experience to his current position as a senior ERISA attorney. He has extensive expertise in compliance with ERISA and other employee benefit laws, including health reform. Scott also has critical experience in public policy and politics, having worked for a former chairman of the Committee on the Budget for the US House of Representatives. Prior to joining Lockton, Scott worked as an employee benefits and executive compensation associate at an AmLaw 100 law firm and was able to hone his skills working with some of the top attorneys in the nation. Scott's previous experience has given him an intimate understanding of ERISA, HIPAA, COBRA, relevant sections of the Tax Code and PHSA, and other laws such as FMLA and USERRA. Scott is a frequent speaker and author on employee benefits and political matters. Scott received his bachelor's degree in politics from Drake University, where he founded the Delta Theta Phi Undergraduate Pre-Law Fraternity, and was a member of Phi Gama Delta (FIJI). He also received his law degree from Drake University, where he graduated with Highest Honors, Order of the Coif. Additionally, he was a member of Delta Theta Phi International Law Fraternity and the Drake University Law Review. Scott joined Lockton in 2014.
Lockton Companies	**Ed Fensholt**	Ed Fensholt - efensholt@lockton.com	Employee Benefits Compliance ERISA Law Expert	Ed has more than 35 years of experience as an attorney and more than 30 years concentrating in the area of ERISA and other aspects of employee benefits law. He has extensive experience regarding compliance issues under the Affordable Care Act, the tax code and ERISA with respect to health and other fringe benefit plans; employee benefits issues in mergers and acquisitions; multiple employer welfare arrangements; and a variety of other employee benefits-related matters. Prior to joining Lockton, Ed established and led the ERISA compliance practice at Palmer & Cay and was a Managing Principal with DeFrain Mayer, an employee benefits consulting firm in Overland Park, Kansas. From 1988 to 1998, Ed practiced law with the employee benefits group of Spencer Fane Britt & Browne, a large Kansas City law firm. Ed became a partner in the firm in 1996. Ed received his bachelor's degree in journalism from the University of Kansas, earning membership in the Kappa Tau Alpha (journalism) and Phi Alpha Theta (history) academic honor societies. He received his law degree from the University of Kansas School of Law, earning membership in the Order of the Coif and the Honor Society of Phi Kappa Phi. He served in the U.S. Army's Judge Advocate General's Corps as a trial attorney and administrative law specialist with the 101st Airborne Division from 1984 to 1988 and with the 1st Infantry Division during the 1991 Persian Gulf War. Ed is a member of various bar associations, a frequent lecturer and author on employee benefits matters, and creator and co-host of Lockton's award-winning podcast series, ERISA Is a Friend of Mine.

Lockton Companies	**Paula Day**	Paula Day - pday@lockton.com	HR Compliance	Paula has nearly 30 years of experience as an attorney with more than 20 years devoted to the area of labor and employment. She has extensive experience in advising employers on human resource compliance issues, including the application of Title VII, ADA, FMLA, other paid leave laws, EEO compliance training, and guiding management through complex cases of discipline or employment termination. Paula's extensive background in employment law provides her with a skill set to help employers ensure compliance with the various federal, state and local employment laws and position employers to be able to vigorously defend claims should they arise. Prior to joining Lockton, Paula served as Senior Counsel, Labor & Employment, at YRC Worldwide, a holding company for multiple large trucking companies which provide a comprehensive transportation network throughout North America. At YRCW, Paula provided advice to all areas of the organization, including Human Resources, Safety, Labor, Operations and Payroll, oversaw employment litigation and charges, and advised senior management of matters involving substantial legal exposure. For more than 15 years prior to her stint at YRCW, Paula was in private practice, focusing on employment law and defending and advising employers. She most recently was a Partner and Of Counsel at Bioff Finucane Coffey Holland & Day, which merged in 2005 with the national labor and employment law firm Fisher & Phillips. Paula received her bachelor's degree in business administration from the University of Kansas and her law degree from the University of Missouri-Kansas City School of Law. She is also a trained mediator.
Lockton Companies	**Elaine Coffman**	Elaine Coffman - ecoffman@lockton.com	Innovative Solutions – Priorities and Budgets, Integrated Benefits, and P&C Strategies	With more than 30 years' experience leading clients and teams, and delivering exceptional results, Elaine joined Lockton to bring an independent, privately held firm with global resources to the Michigan market. She chose Lockton because of the culture, which combines high-performing people with best-in-class resources, balanced client assignments, the curiosity to always improve and the humbleness that creates a great service organization. Elaine specializes in innovative solutions that align with an organization's human capital priorities and budgets, bringing integrated benefits and P&C strategies that support all levels of an organization.
Lockton Companies	**Jaime Kinzer**	Jaime Kinzer - jkinzer@lockton.com"	Employee Benefits Communications	Jaime is responsible for guiding the strategic initiatives for clients. She and her team partner with clients to identify and understand their business and talent management goals and then help customize solutions that align their benefits strategy with these goals. Jaime maintains up-to-date knowledge on market trends and has a passion for leveraging technology and communications to drive employee understanding and engagement of client benefit offerings. She has extensive experience in project management, best-fit vendor selection and implementation, multiyear strategy development and execution, and wellbeing program creation and management that aligns with organizational cultural objectives. When needed, Jaime assists her team with escalated claims or service issues and complex compliance concerns. Early in her career, Jaime worked as an HR practitioner for more than six years in both the for-profit and nonprofit sectors. She is a valued and trusted business partner to all she serves.
Lockton Companies	**Kevin Jones**	Kevin Jones - kjones@lockton.com	Benefits Strategies Financial Tools Data Analysis	A benefits industry veteran, Kevin leads development of client strategy and works with teams to build innovative solutions. With a deep background in problem solving, Kevin prides himself on driving the maximum efficiency per benefit dollar spent. He has been involved in deep-dive analytics for many years including projections, benchmarking, vendor review and contract negotiations. In short, Kevin works closely with clients to simplify and drive positive change in a complex world.
Lockton Companies	**John Price**	John Price - jprice@lockton.com	Employee Benefits	John has 17 years of experience working in human resources and health and benefits consulting. He is an experienced business advisor with an extensive background in employee benefits. John joined Lockton in 2020 as part of their Michigan expansion team as a health, benefits and risk management consultant. He was drawn to Lockton's entrepreneurial culture, which he believes positions the organization to best provide outstanding service to clients. John believes healthcare is one of the most pressing issues of our time. He uses the core tenants of communication, transparency, and understanding through questioning and listening, to guide best-in-class delivery of an organization's human capital objectives. Using data to analyze the cost of risk, implement strategies and predict future cost, John partners with clients to design total rewards programs that meet an organization's goals. Prior to joining Lockton, John worked at Marsh and McLennan Agency-Michigan (formerly McGraw Wentworth) as Director of Practice Development. In that role he consulted with a wide variety of clients from professional service firms to manufacturers to real estate investment trusts. Prior to joining MMA, John worked in the legal department at Trinity Health and in human resources at Sensors, Inc., a Michigan high-tech manufacturer.
Marsh & McLennan Agency	**Susan Morgan Bailey** MS, CIC®, SHRM-SCP, SPHR	Kathryn McRae - kmacrae@mma-mi.com	Building Energy For Your Mission: Thrive Habits For Purpose-Driven Leaders No One Size Fits All: Incorporating DE&I Thinking Into Your Wellbeing Strategy	Susan Morgan Bailey is a high energy leader with more than 20 years of experience in health, benefits and education settings. In her role as Senior Vice President, Culture & Wellbeing Practice Leader at Marsh & McLennan Agency, she calls upon her experience to help organizations build supportive cultures that empower individuals to live healthy, engaged lives. Prior to joining MMA, Susan consulted on and led wellbeing initiatives in a variety of settings from manufacturing to healthcare. Susan is SHRM-SCP and SPHR certified with a BS in Education and a MS in Health Promotion. Recognized for her passion and enthusiasm, she is on a mission to help others find their own high energy, good health and passion for life! In pursuing this mission, Susan enjoys speaking to a variety of audiences and venues, as well as hosts a podcast series.
Marsh & McLennan Agency	**Susan Morgan Bailey** MS, CIC®, SHRM-SCP, SPHR	Kathryn McRae - kmacrae@mma-mi.com	Building Energy For Your Mission: Thrive Habits For Purpose-Driven Leaders No One Size Fits All: Incorporating DE&I Thinking Into Your Wellbeing Strategy	Susan Morgan Bailey is a high energy leader with more than 20 years of experience in health, benefits and education settings. In her role as Senior Vice President, Culture & Wellbeing Practice Leader at Marsh & McLennan Agency, she calls upon her experience to help organizations build supportive cultures that empower individuals to live healthy, engaged lives. Prior to joining MMA, Susan consulted on and led wellbeing initiatives in a variety of settings from manufacturing to healthcare. Susan is SHRM-SCP and SPHR certified with a BS in Education and a MS in Health Promotion. Recognized for her passion and enthusiasm, she is on a mission to help others find their own high energy, good health and passion for life! In pursuing this mission, Susan enjoys speaking to a variety of audiences and venues, as well as hosts a podcast series.

Continued on next page

Marsh & McLennan Agency	**Gary Abernathy** MBA, CDP	Kathryn McRae - kmacrae@mma-mi.com	No One Size Fits All: Incorporating DE&I Thinking Into Your Wellbeing Strategy	Gary has over seventeen years in the employee development and training industry, with a proven track record of partnering with employers and human resources professionals, looking to understand their business and human capital goals in order to develop prescriptive solutions. Gary is a member of MMA's national DE&I team, charged with setting the direction of MMA's DE&I initiatives including talent recruitment, awareness, and training. In addition, he leads Michigan's DE&I practice, designed to help organizations maximize their investment. Gary strategically partners with clients in order to help them establish or grow their DE&I plan, providing consulting as well as training for our clients. In 2019, Gary was named Corp! Magazine's 2019, Diversity Business Leader of the Year.
Priority Health	**David Quinn** Director of Sales & Client Services, West Region - Priority Health	Kristine Pacelli - Kristine.Pacelli@priority-health.com	Understanding health insurance – specifically understanding HSAs, understanding self-funding (ASO) Member experience – member programs/tools: transparency (cost-estimator) and technologies (virtual-care) Wellness/Wellbeing - wellness plans (Wellbeing Hub), workplace wellness initiatives and trends in nutrition and physical fitness	Dave leads sales and client services in the West region for Priority Health and has been a key contributor in driving strategic market development since he joined the company in 2002. Having served over 25 years in the insurance industry, he's credential as a licensed health and life insurance agent, is a registered health underwriter and has conducted seminars and training for thousands of agents and employers on behalf of the company.
Priority Health	**Molly McCoy** Director of Sales & Client Services, East Region - Priority Health	Kristine Pacelli - Kristine.Pacelli@priority-health.com	Understanding health insurance – specifically understanding HSAs, understanding self-funding (ASO) Member experience – member programs/tools: transparency (cost-estimator) and technologies (virtual-care) Wellness/Wellbeing - wellness plans (Wellbeing Hub), workplace wellness initiatives and trends in nutrition and physical fitness	Molly manages the sales, key accounts and client services teams in Priority Health's Eastern region, leading operational excellence and service of the group commercial market. Having spent her entire career in the group insurance industry, she continues to drive growth in SE Michigan. She's currently the board treasurer for the Women's Life Insurance Society and is a proponent of mental health and wellness.
Priority Health	**Jen Seman** Director of Sales and Client Services, North Region - Priority Health	Kristine Pacelli - Kristine.Pacelli@priority-health.com	Understanding health insurance – specifically understanding HSAs, understanding self-funding (ASO) Member experience – member programs/tools: transparency (cost-estimator) and technologies (virtual-care) Wellness/Wellbeing - wellness plans (Wellbeing Hub), workplace wellness initiatives and trends in nutrition and physical fitness	Jen leads our Northern Michigan region and is responsible for a cross-functional team that handles new business, client retention, key account management and wellness. Jen joined Priority Health in 2015 and has over 15 years of industry experience.
Priority Health	**Jeff Hoerle** Director of Sales & Client Services, Southwest Region - Priority Health	Kristine Pacelli - Kristine.Pacelli@priority-health.com	Understanding health insurance – specifically understanding HSAs, understanding self-funding (ASO) Member experience – member programs/tools: transparency (cost-estimator) and technologies (virtual-care) Wellness/Wellbeing - wellness plans (Wellbeing Hub), workplace wellness initiatives and trends in nutrition and physical fitness	Jeff leads sales and client services in the Southwest region, driving market growth and expanding employee benefit solutions. With more than 27 years of experience at Priority Health, Jeff has been instrumental in helping the organization grow in a variety of ways, from leadership in new business sales and client services, to labor management and executive regional leadership.
Priority Health	**Shauna Erard** Director of Key Accounts - Priority Health	Kristine Pacelli - Kristine.Pacelli@priority-health.com"	"Understanding health insurance – specifically understanding HSAs, understanding self-funding (ASO) Member experience – member programs/tools: transparency (cost-estimator) and technologies (virtual-care) Wellness/Wellbeing - wellness plans (Wellbeing Hub), workplace wellness initiatives and trends in nutrition and physical fitness	As the Director of Key Accounts, Shauna supports the key accounts team by managing strategy and resources, enabling the team to provide excellent service to Priority Health's key clients. With over 20 years of experience in consulting, underwriting and sales, she's well-versed in managing the complexities of large, self-funded plans.
Priority Health	**Taya Schick** Director, Small Business - Priority Health	Kristine Pacelli - Kristine.Pacelli@priority-health.com	Understanding health insurance – specifically understanding HSAs, understanding self-funding (ASO) Member experience – member programs/tools: transparency (cost-estimator) and technologies (virtual-care) Wellness/Wellbeing - wellness plans (Wellbeing Hub), workplace wellness initiatives and trends in nutrition and physical fitness	Taya leads the statewide growth and retention for small business employer groups, as well as small business sales and market development in order to create a better health care experience for small groups across Michigan. She oversees a team of internal and external sales representatives who have grown the small business segment for Priority Health.

Continued on next page

Qualigence International	**Steve Lowisz**	Jennifer Reisig - jreisig@qualigence.com	Interviewing Recruiting People Analytics Leadership Development Emerging Leaders	Steve Lowisz is an authority on all things talent, personal development, and business leadership. With experience consulting start-ups, equity-backed, and Fortune 500 companies around the world, you can count on Steve for expert insights and actionable advice. Best known as the founder and CEO of Qualigence International, Steve is a successful five-time entrepreneur with over two decades of practical business experience. With a unique and unconventional delivery style, Steve understands how to connect with everyone from executives and entrepreneurs to human resources and recruiters. As a result, companies including Cisco Systems, Starbucks, Whirlpool, Coca-Cola, Miller, Walgreen's and many others have engaged Steve as a speaker to educate, inspire, and uncover the true potential within their teams.
The Economic Alliance for Michigan	**Bret Jackson** EAM President	Mike Grudzinksi - Mike@eamonline.org	Racial Disparities in Healthcare and It Matters to Employers Variability in Hospital Pricing and How It Impacts the Bottomline Pharmaceutical Benefits Manager (PBM) Assessment How Mental Health is Impacting Employers during the Pandemic Why Drug Prices are so High and What We Can Do About It. Public Policy and How It's Affecting Employers How Healthcare Costs are Impacting the Economy New Surprise Billing Laws: State and National	Bret Jackson is the president of the non-profit Economic Alliance for Michigan (EAM). Founded in 1982, the EAM is comprised of businesses and unions working together with one clear objective, the continued growth of Michigan's economy by creating an atmosphere that inspires job growth and maintains Michigan's competitiveness for attracting new companies and talent. EAM's membership provides health benefits to an estimated 900,000 lives, creating a powerful voice in the health purchaser industry. Bret began working at the EAM in 2007 as legislative director. In 2010, he was elected vice president and became the organization's third president in January 2011. Bret oversees all EAM activities including policy development, research, education, administration, membership, and advocacy. He developed and manages the EAM Health Purchaser Forums, Oncology Symposium, and other various health purchaser roundtables. With the EAM as The Leapfrog Group's Regional Leader for Michigan, Bret is a leader in advocating for patient safety in the State of Michigan and completed The Leapfrog Group's Bruce Bradley Fellowship in 2017. He also serves as chair of the Health Policy Affinity Group and on the Board of Governors for the National Alliance of Healthcare Purchaser Coalitions. Outside of EAM, Bret loves spending time with his family and is very active in the Detroit Curling Club.
The Farmington Hills Branch of Graystone Consulting, a business of Morgan Stanley	**Mark J. Rogers** CIMA®	Jeff Rogers - Jeffrey.Rogers@morganstanley.com	Financial Wellness Programs Investment Management Executive Financial Services	Mark J. Rogers, CIMA®, Executive Director, Institutional Consulting Director and Family Wealth Director, has worked in the investment and financial consulting industry since 1985. He serves as a lead consultant and oversees strategic portfolio construction, asset allocation strategy, investment policy analysis, market research and day-to-day investment management responsibilities for client portfolios. Mark earned Morgan Stanley's Investing with Impact Director designation because of his advanced experience and leadership in Sustainable Investing. Mark is frequently asked to speak at workshops and in the media about the emerging Impact Investing field, Financial Wellness Programs and Executive Compensation. As a Family Wealth Director, Mark provides an integrated approach to planning through Family Office. The business unit leverages sophisticated resources and exclusive tailored investment opportunities to help meet the complex needs of investors with significant wealth. These services include access to lending services, art advisory, personal and business risk management, wealth transfer strategies, family governance advising, impact investing and philanthropy coordination. Mark earned the IMCA Certified Investment Management Analyst (CIMA) designation from Wharton School of Business, University of Pennsylvania. He is a member of Investments & Wealth Institute (IWI). He graduated from Michigan State University with a Bachelor of Arts degree in Business/Economics. Mark is founder and chair of the Birmingham Country Club Business Roundtable, a business networking group.
The Farmington Hills Branch of Graystone Consulting, a business of Morgan Stanley	**Gary W. Jbara** CRPS®, CIMA®	Jeff Rogers - Jeffrey.Rogers@morganstanley.com	Investment Management Executive Compensation Plans Corporate Retirement Plans (Defined Benefit and Defined Contribution/401(k)	Gary W. Jbara, CIMA®, CRPS®, Executive Director, Institutional Consulting Director, and Corporate Retirement Director, has worked in the investment and financial consulting industry since 1985. Gary serves as a lead consultant and oversees strategic portfolio construction, asset allocation strategy, investment policy analysis, market research and day-to-day investment management responsibilities for client portfolios. As an Institutional Consulting Director, Gary provides comprehensive resources for institutional investors through Graystone Consulting. These services include asset/liability studies, investment policy statement analysis, spending policy analysis, investment manager research and donor advised fund administration. In addition to asset management, Gary conducts committee and board member educational workshops and provides assistance with donor recruitment and education. The Corporate Retirement Director designation enables Gary to offer advanced resources and services for the administration of retirement plans, such at 401(k)'s, cash balance and defined benefit plans. Gary can offer contracted services to clients, including enhanced assistance with vendor selection and investment reviews, manager selection, and 3(21) or 3(38) fiduciary oversight. Gary earned the IMCA Certified Investment Management Analyst (C.I.M.A.) designation from Wharton School of Business, University of Pennsylvania. He holds a Chartered Retirement Plan Specialist designation from the College of Financial Planning. He is a member of Investments & Wealth Institute (IWI) and a member of the Association of Professional Investment Consultants (APIC.) Gary received a Bachelor of Science degree in Mathematics and Business from the University of Notre Dame and an MBA from the University of Michigan. He is a past president and active board member of the Notre Dame Club of Detroit.

Continued on next page