

JOIN US FOR THE 36TH ANNUAL

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CONFERENCE

EMPLOYEE BENEFITS INSTITUTE

THURSDAY, APRIL 21, 2022

IN-PERSON AND VIRTUAL

ATTENDANCE OPTIONS AVAILABLE

Overland Park Convention Center, 6000 College Blvd., Overland Park, Kansas

Co-sponsored by the Employee Benefits Institute of Kansas City, Inc. and UMKC School of Law

2022 Chairperson
JIM NORTH, JR.
THE TODD ORGANIZATION

Register online at employeebenefitsinstitute.com



Continuing Legal Education Credit: Missouri: 8.0 hours | Kansas: pending

Visit the website for details on continuing education credit is for insurance professionals, certified public accountants, certified financial planners and human resource professionals.

SCHEDULE

8:00 a.m. In-person registration and Webcast Access opens

8:20 a.m. **Welcome** - Jim North, Jr., The Todd Organization, 2022 Chairperson

8:30 a.m. **Employee Benefits Update: Politics, Process and Policy**



James A. Klein, President, American Benefits Council

Federal legislative gridlock has two by-products: more Executive Branch action and more activities in states and localities which imposes new challenges for ERISA federal preemption. James Klein will examine the political dynamics in an election year and the parameters of Congressional action that are shaping employee benefits policy.

9:20 a.m. **Personal Health Activism: Investing in Emotional Wellbeing for the Long Term**



Jason Doescher, MD, Chief Medical Officer, MOBE for Life

As humans, it's easy to *say* we'll do something - but taking action in our daily lives is hard. This session will explore the psychology of change - and why offering emotional health programs as part of your company's benefit package is simply not enough to affect real change.

10:10 a.m. **Break**

10:25 a.m. **Surprise Medical Billing Protections: Politics, Policy and the Future of Federal Price Transparency**



Ryan C. Work, Senior Vice President, Government Relations, Self-Insurance Institute of America, Inc.

Surprise billing patient protections have been years in the making, culminating in the passage of the No Surprises Act. Just months into implementation of this groundbreaking legislation, this session will provide an in-depth analysis of the surprise billing rules, including the lessons, opportunities and challenges brought about by the politics of healthcare price transparency.

11:15 a.m. **Five Questions You Should Ask Your PBM Today**

Josh Golden, Capital Rx



Ever get the feeling that your PBM isn't working in your best interests? The typical PBM's business model derives profit from dispensing and rebate retention - and this can create tremendous conflicts of interest for plan sponsors working to reduce cost and control utilization. In this session, industry expert Josh Golden recommends five straightforward questions that will help you determine if your PBM is aligned with your goals and objectives.

12:05 p.m. **Lunch Break**

12:45 p.m. **What Comes Next for Organizations and Their Workforces: Global Talent Trends & the Future of Work**



Lee W. Bannister, Mercer

The pandemic era has left its indelible mark on our world, perhaps most prominently on organizations and their workforces. We'll share Mercer's 2022 Global Talent Trends, what the Future of Work looks like and how organizations can get out ahead of the changes ahead.

1:35 p.m. **Dessert Break & Room Change**

1:45 p.m. **The Intersection of Benefits: Strategy, Well-being, Analytics and Diversity, Equity, Inclusion & Belonging (DEIB)**



Tony Garavaglia, Senior Vice President, Employee Benefits, Alliant Insurance Services

During this session, you will hear about well-being strategies to help differentiate employers in the marketplace and the business imperative for tying together DEIB, social determinants of health and data analytics.

2:35 p.m. **Break**

SCHEDULE

2:50 p.m. **Cybersecurity - the new frontier: Protecting Yourself, Your Clients and Your Law Firm**



Phillip Ferraro, Managing Director, Global Head, Cyber Advisory, J.P. Morgan Private Bank

Law firms play a crucial role for wealthy clients and commercial partners, often handling critical and sensitive data and assisting with both personal and business transactions. As an attorney, you may have access to intellectual property, merger and acquisition deals and other confidential and personal information. Hackers and fraudsters actively target law firms and other trusted advisors to try to steal such data and credentials.

Law firms and their employees have a professional responsibility to keep their clients' data and information safe from fraud. It's vital to understand where you can be personally and professionally vulnerable to attacks and fraud schemes, and steps you can take to help protect yourself and your firm.

3:40 p.m. **Fiduciary Risk Transfer**



Bret Hamlin, Hill Ward Henderson

Troy Tisue, President TAG Resources, LLC

Ted Schmelzle, J.D., CIPP/US, Second Vice President, Customer Operations, Retirement Solutions, Securian Financial Group, Inc.



Fiduciary Risk Transfer is a panel discussion with “The Father of the Open MEP,” a pioneer in the new world of PEPs, and an ERISA attorney who recently chaired the Employee Benefits Committee for the American Bar Association. Panelists will unpack the actual mitigation of risk and liability through various fiduciary outsourcing, including the use of an ERISA 3(16) Administrative Fiduciary, an ERISA 402(a) named fiduciary, an ERISA 3(38) Investment Fiduciary, and an ERISA 3(21) Co-Fiduciary (or Investment Advisor). Should plan sponsors outsource these fiduciary duties? Is there an actual transfer of fiduciary risk? Or... is it just a marketing gimmick for plan sponsors to pay for these services?



4:30 p.m. **Closing Remarks**

4:35 p.m. **Networking Social**

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36th Annual Conference

EMPLOYEE BENEFITS INSTITUTE

Thursday, April 21, 2022

In-person and Virtual Attendance Available

Registration

Online registration/payment: employeebenefitsinstitute.org **Event Code:** KBC36

Registration fee: (check one)

\$225 early bird full day \$275 after April 1

Please select your attendance option

In-Person C) Webcast

Registrant's identification: (check all that apply)

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