Greetings from Leavitt Great West Insurance Services,

Bust out of the boardroom and gear up for big-time benefits and risk management education and adventure at Leavitt’s 9th Annual Health & Benefits Summit. The theme of the conference—The Big Heist—identifies the ways healthcare has stolen the American Dream, and more importantly, how employers can help take it back. Join your peers from across the region to hear from nationally-recognized industry experts, thought leaders, healthcare executives, and business strategists from across the U.S. as they offer new insights in benefit design, highlight integrated care models for better patient outcomes, and present measurable, money-saving tactics designed to improve your organizations’ and employees’ personal and financial health.

Join the Leavitt Great West team of experts on June 11-12 in scenic Big Sky Montana for a collaborative discussion that will illuminate new innovations in healthcare, pharmacy, plan design, substance abuse treatment, consumer engagement and patient navigation. This dynamic, two-day Summit program, which includes educational sessions coupled with evening mixers and outdoor activities, is designed to reveal new insights and provide attendees with a blueprint, strategy and access to expertise and other resources that help improve your organization’s and your employees’ personal and financial health.

Shawn Samuelson
PARTNER, LEAVITT GREAT WEST INSURANCE SERVICES.

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

Dave Chase
HEALTHCARE ENTREPRENEUR, STRATEGIST AND BEST-SELLING AUTHOR CREATORE AND CO-FOUNDER, HEALTH ROSETTA
Dave is focused on creating a bottom-up movement to call attention to the collateral damage caused by our catastrophically dysfunctional healthcare system and the tremendous successes and opportunities with Health Rossetta-type health plans. Chase was the Co-founder of Avado, acquired by and integrated into WebMD/Medscape—the most widely used healthcare professional site as well as Microsoft’s $2B, 28,000 partner healthcare ecosystem. His TEDx talk Healthcare Stole the American Dream - Here’s How We Take It Back sums up the current devastation and the coming redemption. Chase’s first book, CEO’s Guide to Restoring the American Dream: How to deliver world class healthcare to your employees at half the cost became a Kindle #1 best seller. His latest book, The Opioid Crisis Wake-Up Call, outlines how the opioid crisis isn’t an anomaly. Chase has reached 750,000 people through his writing & speaking.

Tim Callender, Esq.
VICE PRESIDENT, SALES & MARKETING, THE PHIA GROUP, LLC
Tim has specialized expertise with complex appeals, direct provider negotiations, plan document interpretation, stop-loss conflict resolution, keeping abreast of regulatory demands, vendor contract disputes, and many other issues unique to the self-funded industry. Attorney Callender is active in the industry, speaking at national conferences and serving on the Board of Directors for industry associations such as: Society of Professional Benefit Administrators (“SPBA”) and the Health Care Administrator’s Association (“HCAA”).

Cori Cook
FOUNDER OF CMC CONSULTING, LLC, AND VEZAHEALTH, LLC.
Ms. Cook is an experienced corporate and legal strategist specializing in health care, insurance, PPACA, HIPAA, ERISA, employment and regulatory matters, and has been active within the self-funded industry for many years. She has served on various boards and committees throughout her career, representing the legislative and regulatory interests of the industry. She serves as an appellate mediator on behalf of the Montana Supreme Court and was the third Montana attorney selected for membership in the Federation of Defense and Corporate Counsel. Ms. Cook graduated from Gonzaga School of Law, is a frequent national speaker on topics related to health care and employee benefits, and her expertise has been widely sought by government and industry in the arena of health care and health care reform.

Erin Weenum
EMPLOYEE BENEFITS STRATEGIST, LEAVITT GROUP
With more than fifteen years’ experience in the industry, Erin Weenum is a recognized thought leader on cost mitigation strategies and leads Leavitt Great West’s efforts toward strategic plan design, regulatory and fiduciary compliance, direct provider contracting, direct primary care arrangements, transparent pharmacy benefit models, site of care innovation, and benefit branding.

Tim Ryan
BEST-SELLING AUTHOR, A&E’S “DOPE MAN,” FOUNDER OF A MAN IN RECOVERY AND NATIONAL OUTREACH DIRECTOR FOR TRANSFORMATIONS TREATMENT CENTER
A former business leader in a high-tech industry, Tim made and lost millions. As a heroin addict, Tim is a walking miracle who overdosed eight times, suffered two minor heart attacks, and was pronounced clinically dead three times. The star of A&E’s Dope Man and best-selling author of From Dope to Hope: A Man in Recovery, Ryan found recovery in prison and has committed his life to sharing a message of hope after losing his son to an overdose soon after finding sobriety himself. As founder of A Man in Recovery Foundation and one of the world’s leading recovery advocates, Tim works tirelessly to expose the truth about addiction from a former addict’s perspective and offer assistance to individuals, families and communities impacted by America’s opioid abuse epidemic. A regular on WGN radio, Tim has also appeared repeatedly on CNN and named one of the top 100 visionary leaders in the world by Real Leaders magazine in January, 2018.

Adam V. Russo, Esq.
CO-FOUNDER AND CHIEF EXECUTIVE OFFICER OF THE PHIA GROUP LLC
Adam is Co-Founder and CEO of The Phia Group, LLC, an experienced provider of health care cost containment techniques offering comprehensive claims recovery, plan document and consulting services designed to control health care costs and protect plan assets. Mr. Russo is a frequent speaker and author on health care and employee benefits topics at webinars, conferences and seminars across the country and also active in the industry, serving as the 2018 Chairman-Elect of the Board of Directors for the Self-insurance Institute of America, Inc. (SIIA) and Board member of the Massachusetts Association of Health Underwriters (MAHU).

Mary Kay Puckett
SENIOR CONSULTANT, LEAVITT GROUP
Mary Kay Puckett has B.A. from Carroll College in Helena, Montana and over 32 years of experience in the health benefits field advising large, self-funded employers on employee health and pharmacy benefit strategies focused on proven cost containment and risk management strategies. Over the last 5 years, she has dedicated considerable time to bring forth transparency in all aspects of health care purchasing. She is a Certified Health Consultant, Group Benefits Disability Specialist, and holds designations from The Health Insurance Association of America and the National Wellness Institute. Mary Kay is a member of the International Foundation of Employee Benefits, the Self Insurance Institute of America, and SHRM. She is also involved with several local non-profit foundations.
Yoga in Big Sky ~ Mountain Mall North Mammoth

Namaste. Take deep breaths and inhale the fresh mountain air of Big Sky while you open up your mind, body, and spirit. Guests will join a certified yoga instructor in the North Mammoth room of the Mountain Mall. Towels/mat provided.

Golf in Big Sky!

Combine classic links-style golf and the stunning natural beauty of Big Sky country to witness a golf experience like no other. Guests can elect to stay longer to play the award winning, scenic 18 hole par 72 golf course at Big Sky Resort. The Arnold Palmer designed course is 6,500 feet above sea level, offering longer drives and spectacular views. This activity is not included with your registration fee.

If you have guests with you, or are planning to extend your stay in Big Sky, be sure to also check out the other Summer Activities at: https://bigskyresort.com/while-youre-here/summer-activities

Activities for Summit Attendees

Hiking in Big Sky - Base Camp

Get acquainted with Mother Nature during your Big Sky stay. Bring your sense of adventure (and comfortable, sturdy shoes) to enjoy a morning hike with an experienced local guide. Guests will meet in front of the Base Camp at 6am.

Ask the Experts

Zachary Scheer, M.D.

Dr. Scheer is fellowship trained at The Core Institute in primary and complex total knee and hip arthroplasty with an emphasis on Computer Navigation. He attended undergraduate studies at Colorado College and medical school, internship and residency through the University of South Alabama College of Medicine in Mobile, AL. He completed his fellowship through The Core Institute Primary and Complex Total Knee and Hip Arthroplasty with an Emphasis on Computer Navigation in Phoenix, AZ. Dr. Scheer has board certification through the American Board of Orthopedic Surgery and holds professional affiliation with the American Academy of Orthopedic Surgery. Dr. Scheer’s primary focus involves total joint replacement.

Jill-Marie Steeley, MPH

EXECUTIVE DIRECTOR, PUREVIEW HEALTH CENTER

Jill is originally from Salt Lake City, UT, but has enjoyed life in Montana for the past eleven years. Jill joined PureView Health Center in May, 2015. Prior to joining the organization she spent nearly four years as the Director of the Health and Human Services Division of the Gallatin City-County Health Department, seven and a half years as the Director of the Madison County Health Department, and was a senior analyst for Goldman Sachs in Salt Lake City, UT for four years. Jill has a Master’s degree in Public Health from the University of Montana and a Bachelor of Science degree in Business Administration from the University of Phoenix.

Mariya Waldenberg, RN

CHIEF CLINICAL CONSULTANT, VEZAHEALTH

Mariya comes from a diverse nursing background including intensive care, community health, nursing education, health research and graduate studies. Waldenberg focuses on generating a platform for the patient voice and creating services aimed to fully engage, empower, and educate patients to achieve their health and wellness goals. A member of the Northern Cheyenne Tribe, Mariya advocates for education and health in underserved populations, relaxing with her family and exploring the outdoors from horseback.
## 2019 Health & Benefits Summit Overview & Agenda

**Summit Lodge — Big Sky, MT**

### Tuesday, June 11

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>9:00 AM</td>
<td>Registration</td>
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| 10:00 AM| **Welcome—Opening Remarks**  
  Shawn Samuelson and Mary Kay Puckett |
| 10:30 AM| Health Plan Trends, ERISA Fiduciary Responsibilities and Updates from the Hill  
  Adam Russo, Esq. |
| 11:30 AM| **The Opioid Crisis Wake Up Call**  
  Dave Chase |
| 12:30 PM| Luncheon & Captive Presentation |
| 1:30 PM| **The Hidden Addiction in Your Workforce**  
  Tim Ryan |
| 2:45 PM| Networking Break |
| 3:15 PM| **Ask the Experts: Integrated Care Models to Optimize Patient Outcomes**  
  • Mary Kay Puckett, Moderator  
  • Zachary Scheer, MD  
  • Jill Steeley, MPH  
  • Maria Waldenberg, RN |
| 6:30 PM| Cocktail Reception, Dinner & Comedy Show  
  Huntley Lodge Dining Room |

### Wednesday, June 12

<table>
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<tr>
<th>Time</th>
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<tr>
<td>6:00 AM</td>
<td>Morning Wellbeing Activities (Yoga or Hiking)</td>
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<tr>
<td>7:30 AM</td>
<td>Hosted Breakfast Buffet</td>
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| 8:30 AM| **World Class Benefits to Attract and Retain Top Talent**  
  Tim Callendar |
| 9:30 AM| **Medical Second Opinions and Patient Navigation**  
  Cori Cook |
| 10:30 AM| Networking Break |
| 10:45 AM| **Engaging a Multi-Generational Workforce**  
  Erin Weenum |
| 11:45 AM| Closing Remarks  
  Shawn Samuelson |
Registration Fees
Register by April 24th to receive the early bird rate of $350
After April 25th the rate increases to $450

Registration Cancellation Policy
Full refund less a $50 cancellation fee is available until May 25th.
No refunds are available after May 25th.

Leavitt’s 2019 Health & Benefits Summit is the Edu-tainment Event of the Summer!

New this year! Comedy show with Patrick Keane
“Born in the Midwest, raised on the “mean streets” of Orange County, California, played football and graduated from Carroll College in Montana and....”
a three-year stint in Asia make Patrick Keane a comedian with a background. Why college in Montana? Football scholarship. Why Asia? To get far away from football.

Patrick has appeared on Comedy Central’s 'Live At Gotham', the Late Late Show with Craig Ferguson, Jimmy Kimmel Live, the Bob and Tom Show, XM Radio, Spotify, Comics Unleashed, and the Montreal Comedy Festival. Patrick is also the creator and lead actor in the web series "5th Quarter”; a weekly press conference held every Sunday night detailing what it was like to watch football all day with his buddies.

He can name all the U.S. Presidents in order and knows every Super Bowl match-up in history. His dry sarcastic self-deprecating style originates from comedy influences Bill Murray, Jerry Seinfeld, Gene Wilder and John Wooden. You won’t want to miss Patrick’s performance following the Business Partner Dinner and Cocktail Hour on Tuesday night!

The Venue
THE SUMMIT LODGE
Located in beautiful Big Sky, Montana

The elegant Euro-Western Summit at Big Sky has been the vacation choice of both President Obama and Vice President Biden. The Summit is one of the finest slopeside properties in the Rockies with primary high-capacity lifts only 100 yards away. The Summit combines luxury appointments with Boyne Beds and a prime location in the heart of the Mountain Village Center. Select rates include breakfast.

For Reservations
Call Big Sky Central Reservations at 800-548-4486 and refer to the Leavitt Great West conference. Please make your reservation by April 24th in order to receive the special group rates. A deposit equal to one night’s lodging is required when making the reservations. Any individual room cancelled within thirty days of arrival will forfeit one night’s deposit, i.e. no refunds will be granted for cancellations made within 30 days of arrival. Exceptions may be granted with medical documentation. Prices do not include 17% tax and service fees.

Register Online at:
www.kynexions.com/2019leavittsummit/