



## Conference Agenda

### Monday, May 4, 2020

<b>Time</b> <b>All Central Time</b>	<b>Event</b>
9:00 a.m. - 10:00 a.m.	<p><b>Meet and Greet UBA Alliances</b></p> <p>Join UBA Alliances in the Virtual Exhibitor Hall.</p>
10:00 a.m. - 11:30 a.m.	<p><b>UBA Welcome &amp; COVID-19 Discussion</b></p> <p><i>Speakers:</i> Mindi Vogel, The Megro Benefits Company John Hearn, The Benefits Company Erik Hansen, Vita Terriann Procida, Innovative Benefit Planning</p> <p>UBA welcomes you to its first-ever virtual conference with an introduction to the virtual platform. Join our discussion on COVID-19, disaster preparation, the effects it had on your businesses, and more.</p>
11:30 a.m. - 12:30 p.m.	<p><b>Meal Break &amp; Exhibitor Meet and Greet</b></p> <p>Take time for a one-hour break or enjoy lunch while browsing our Virtual Exhibitor Hall.</p>
2:00 p.m. - 3:30 p.m.	<p><b>UBA Offerings</b></p> <p>Join UBA staffers as we provide education on all that UBA offers its Partners.</p>
2:00 p.m. - 2:05 p.m.	<b>Welcome</b> – Amanda Thorson, UBA Manager of Partner Relations
2:05 p.m. - 2:25 p.m.	<b>UBA Wisdom Network and AdEase</b> – Meg Cipar, UBA Editor of Digital Media
2:30 p.m. - 3:00 p.m.	<b>UBA Products, Tools &amp; Services</b> – Brian Leighton, UBA Senior Director of Strategic Solutions
3:05 p.m. - 3:15 p.m.	<b>Compliance</b> – Bonita Hatchett-Bodle, UBA Director of Compliance
3:20 p.m. - 3:30 p.m.	<b>Marketing</b> – Bill Olson, UBA Senior VP of MarCom (retired)
12:30 p.m. - 2:00 p.m.	<p><b>Peerspectives Group Meetings</b></p> <p>Partner Firm Principals are invited to join in high-level conversations with like-minded leaders and review the results of the Performance Share Survey. This session is only open to Principals or other previously-approved UBA Partners.</p>



# VIRTUAL CONFERENCE AND EXPO



Powerful Partnerships - Together We Can  
May 4 - 5, 2020



## Monday, May 4, 2020 (continued)

**Time**  
**All Central Time**

**Event**

2:15 p.m. - 3:45 p.m.

**Shareholder Business Meeting (Principals Only)**

UBA Principals are invited to a high-level conversation on the state of UBA.

## Tuesday, May 5, 2020

**Time**  
**All Central Time**

**Event**

8:45 a.m. - 9:45 a.m.

**Meet and Greet UBA Alliances**

Join UBA Alliances in the Virtual Exhibitor Hall.

10:00 a.m. - 10:15 a.m.

**Wheel of Form 5500**

*Speaker:* Olivia Ash, ComplianceDashboard

ERISA imposes various regulatory requirements upon group health plans. Form 5500 is a critical element of health & welfare compliance. Join ComplianceDashboard Consultant, Olivia Ash, JD, as she counts down (in 15 minutes - fast!) 7 tips for Form 5500. Attendees may follow along with the provided, "The 411 on Form 5500" and use it as a guide for filing compliance.

10:15 a.m. - 11:15 a.m.

**Keynote Speaker: Janet Trautwein**

Join Janet Trautwein, CEO of NAHU, for a legislative update.

11:30 a.m. - 12:30 p.m.

**Breakouts**

**The Formula to Supercharge Consulting**

*Speakers:* Mary Delany, President, Vital Incite  
Kris Powell, BenePro  
Jason Pastrano, Brio Benefit Consulting  
Kevin Burns, The DeHayes Group

This "TED Talk" format will cover a progression of using population health to drive practice outcomes, starting from a definition of population health and what levers are considered in analysis and solutions then moving to UBA partners talking about how this has changed the way they practice. The three advisor talks will explore how to leverage population health to go up-market and use population health to strategize for a larger employer, how the data has helped a complicated client to move in the right direction, and how population health resources were leveraged to improve client outcomes.



**Tuesday, May 5, 2020 (continued)**

<b>Time</b> <b>All Central Time</b>	<b>Event</b>
11:30 a.m. - 12:30 p.m.	<p>Breakouts (continued)</p> <p><b>Adapting Your Marketing for COVID-19</b></p> <p><i>Speakers:</i> Alyssa Bland, AEIS            Jamie Bratton, Innovative Benefit Planning            Sonia Blumstein, Valent Group</p> <p>Taking the right steps and managing messaging has always been challenging for marketing. In the current environment, foreseeing your client needs and expectations requires a fluid plan that does not exploit tragedy. Learn how your peers, located in three distinct and geographic locations, are proactively adapting their plans to communicate with clients and manage their brand. This UBA Partner panel of marketing experts will share their swift and evolving actions to effectively inform employers in their marketplace and to build trust in their brand.</p> <p><b>Compliance Session</b></p> <p><i>Speaker:</i> Bonita Hatchett-Bodle, UBA</p> <p>In response to the spread of the 2019 novel coronavirus (COVID-19), President Trump signed the First Families Coronavirus Response Act into law on March 18, 2020 (FFCRA) followed by the <a href="#">Coronavirus Aid, Relief, and Economic Security Act</a> (CARES Act) on March 27, 2020. The FFCRA requires employers to provide paid sick and child care leave necessitated by COVID-19. The CARES Act is the third phase in Congress' response to COVID-19 following the Coronavirus Preparedness and Response Supplemental Appropriations Act, 2020 and the FFCRA. In addition to providing emergency relief aimed at individuals and hospitals, the roughly \$2 trillion CARES Act provides emergency relief to small businesses. The Legislative Update session provides an overview on this important COVID-19 guidance focusing on the FFCRA employer mandates and the CARES Act business relief provisions which will undoubtedly be instrumental in ensuring the survival of businesses during the COVID-19 crisis.</p>
12:30 p.m. - 1:30 p.m.	<p><b>Meal Break &amp; Exhibitor Meet and Greet</b></p> <p>Take time for a one-hour break or enjoy lunch while browsing our Virtual Exhibitor Hall.</p>



**Tuesday, May 5, 2020 (continued)**

<b>Time</b> <b>All Central Time</b>	<b>Event</b>
1:30 p.m. - 2:30 p.m.	<p><b>Breakouts</b></p> <p><b>Perpetuation Discussion (<i>Principals only</i>)</b>  <i>Speakers:</i> David Hatter, Arista Consulting Group            Travis Riker, Arista Consulting Group            John Hearn, The Benefit Group</p> <p>Join UBA Partners as they share their stories of perpetuation. Learn how they are either creating plans or have perpetuated.</p> <hr/> <p><b>How to use the Health Plan Survey</b>  <i>Speakers:</i> Seth Brewer, EHD            Jessica Equivel, Dillingham Benefits            Summer Brown, Dillingham Benefits            Jennifer Gibson, KPD Insurance</p> <p>Join UBA Partners as they share how they utilize the UBA Health Plan Survey for the maximum benefit to their firm and clients.</p> <hr/> <p><b>High Performing Leaders</b>  <i>Speakers:</i> Chad Jenkins and Jeff Jenkins, Blueprint Consulting</p> <p>Blueprint Consulting will discuss what high-growth agencies are doing to grow and develop high-performing sales organizations.</p>
2:45 p.m. - 3:30 p.m.	<p><b>UBA Level-Funded Program</b>  <i>Speakers:</i> Rob Valerious, Allied Benefit Systems            Dave Gillis, National General</p> <p>Many UBA Partner Firms have large blocks of business in the under-50-lives space. A subcommittee of the Products, Tools, and Services and the Strategic Partner Committees was formed to identify a level-funded solution that will give you an edge over your competitors. We are proud to introduce you to the UBA Level-Funded Program, brought to you by National General and Allied Benefit Systems.</p>



**Tuesday, May 5, 2020 (continued)**

<b>Time</b> <b>All Central Time</b>	<b>Event</b>
3 :30 p.m. - 4:30 p.m.	<p><b>Self-Funding TED Talks</b></p> <p><i>Speakers:</i> Billy Potter, Snellings Walters Insurance Agency            Todd Peterson, Matsock and Associates            Mark Matsock, Matsock and Associates</p> <p>Join UBA Partners as they share their best practices in the self-funding world.</p>
4:30 p.m. - 4:45 p.m.	<p><b>Closing Remarks</b></p> <p><i>Speaker:</i> Eric Fredriksen, Fredriksen Health Insurance</p> <p>Hear updates from the UBA Conference Committee Co-chairs as we close out our UBA Virtual Spring Conference.</p>

Updated 4/27/20