

Health Plan Update in Texas

This one-day seminar is designed for human resource managers, benefits administrators, payroll managers, human resource managers, benefits administrators, payroll managers, accountants, business and office managers, and insurance professionals.

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Dallas, Texas
July 19, 2007

Moderator:

Cynthia Marcotte Stamer

Glast, Phillips & Murray, P.C.

Carol Bailey, RHU

Jeff Hawes, Pharm.D.

Pharmaceutical Strategies Group

RoseMary Deininger, HIA, RHU

Waldman Bros, L.L.P.

David Peters

BellGroup Insurance

Emily D. Taylor

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Teresa Thompson

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See inside for details.

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Critical Issues on the Agenda

8:30 AM – 8:35 AM	Overview — <i>Cynthia Marcotte Stamer</i>
8:35 AM – 10:00 AM	Legal Requirements for Health Plans — <i>Cynthia Marcotte Stamer</i>
10:00 AM – 10:10 AM	Break
10:10 AM – 11:00 AM	Lesser Known Options for Property/Casualty Insurance — <i>David Peters</i> A. Employment Practices Liability B. Employee Dishonesty
11:00 AM – 11:45 AM	Meeting the Challenge of Specialty Pharmacy Cost Management — <i>Carol Bailey, RHU, and Jeff Hawes, Pharm.D.</i>
11:45 AM – 12:00 PM	Questions and Answers — <i>Carol Bailey, RHU, Jeff Hawes, Pharm.D., David Peters and Cynthia Marcotte Stamer</i>
12:00 PM – 1:00 PM	Lunch (On Your Own)
1:00 PM – 2:00 PM	Building Employees' Health Care Toolkit: Health Care and Disability Survival Training for Employees — <i>Cynthia Marcotte Stamer</i>
2:00 PM – 2:45 PM	Health Benefit Strategies for Small Groups — <i>RoseMary Deininger, HIA, RHU</i>
2:45 PM – 2:55 PM	Break
2:55 PM – 3:15 PM	Staffing Companies and Professional Employment Organizations Health Benefits — <i>Teresa Thompson</i>
3:15 PM – 4:00 PM	Health Plan Litigation — <i>Emily D. Taylor</i>
4:00 PM – 4:45 PM	Wellness and Disease Management Strategies — <i>Cynthia Marcotte Stamer</i>

You may increase the interest of potential seminar attendees by adding subtopics to this agenda, like so:

- I. **Topic Example**
 - A. Subtopic
 - B. Subtopic
 - C. Subtopic

Lorman Education Services reserves the right to modify the agenda and the faculty when circumstances are beyond our control.

Attendee comments from other Lorman seminars:

“It was a great experience and also extremely informative.”

— *Shea Whitfield-Davis*

Our Distinguished Faculty

Carol Bailey, RHU, is a pharmacy benefit consultant with Pharmaceutical Strategies Group. She also serves as director of the National Rx Alliance, a national purchasing coalition for public and private sector business. Ms. Bailey has over 20 years of experience in the health care industry, having worked in account management and sales with several regional insurance carriers, third-party administrators and pharmacy benefit managers. Prior to joining PSG, she was a regional sales manager for Medco Health Solutions and served as president of the Dallas Association of Health Underwriters. A veteran of the managed care and pharmacy benefits industry, Ms. Bailey's experience with fully-insured and self-insured employer plans has given her a broad-based view of benefit plans. She has been the recipient of numerous industry accolades. Ms. Bailey is a registered health underwriter.

RoseMary Deininger, HIA, RHU, has been an employee benefits professional since 1990. Her experience includes working for two national insurance carriers, healthcare professionals and an international broker. She has expert training in long-term care coverage and disability insurance. As manager of the Employee Benefits Division at Waldman Bros., Ms. Deininger uses her extensive knowledge of her field to oversee operations of that department. She is a health insurance associate and a registered health underwriter. Ms. Deininger is a member of the Dallas, Fort Worth, Texas and National Associations of Health Underwriters; an associate member of Certified Employee Benefit Specialist; and an associate member of America's Health Insurance Plans. She attended St. Joseph's University in Pennsylvania.

Jeff Hawes, Pharm.D., is a pharmacy benefit consultant with Pharmaceutical Strategies Group. A trained and seasoned clinician, he consults with employers, health plans and other organizations to help maximize the value of their pharmacy benefit management program. Mr. Hawes has over 16 years of managed care pharmacy experience. Prior to joining PSG, he was a clinical account manager for a major pharmacy benefit manager where he focused on delivering solutions to the managed care marketplace. Before this, he had P&L responsibility for the pharmacy benefit as a pharmacy director for a large managed care plan. Mr. Hawes holds a B.A. degree in biology from Indiana University, a B.S. degree in pharmacy from a Purdue University, and a Pharm.D. degree from the University of Florida.

David Peters is vice president of client development for BellGroup Insurance in Dallas. Mr. Peters has 26 years of experience in the insurance industry as an agent, agency owner and president of an agency. He concentrates in commercial property and casualty insurance, and he has presented more than 40 times to industry groups on topics related to this specialty. He focuses on health care and physician groups. Mr. Peters serves on the foundation board of Richardson Regional Medical Center and has developed an extensive network of professionals in Dallas who work with medical practices. Mr. Peters has a master's degree in counseling education. This background has helped in assessing the needs of his customers and designing an insurance program that works and is cost-effective. In addition to numerous civic activities, Mr. Peters also has served as chairman of the board of the Richardson Chamber of Commerce and was selected as Citizen of the Year for Richardson in 2004.

Cynthia Marcotte Stamer is a member of Dallas office of the law firm of Cynthia Marcotte Stamer, P.C., a member of Glast, Phillips & Murray, P.C. She is nationally and internationally recognized for her knowledge on health and other employee benefits, human resources and related insurance, health care and tax matters. As chairman of the Welfare Plan Committee of the ABA Real, Property Probate and Trust Section and vice chair of the Managed Care and Insurance Interest Group of the ABA Health Law Section, Ms. Stamer applies her extensive expertise on health and other employee benefit and insurance matters to assist clients in a wide range of business and litigation contexts. She is board certified in labor and employment law with extensive experience in fiduciary and other employee benefit risk management matters. She is also a highly regarded author and speaker who serves in leadership positions in numerous organizations. Ms. Stamer is the author of several hundred highly regarded publications. She received her B.A. degree from Arizona State University and her J.D. degree from Loyola Law School in Los Angeles. Ms. Stamer is board certified in labor and employment law by the Texas Board of Legal Specialization. She can be reached at cstamer@gpm-law.com or (972) 418-7188 or the Web site www.cynthiastamer.com.

Emily D. Taylor is with Glast, Phillips & Murray, P.C. Ms. Taylor's experience includes general commercial litigation and labor and employment law litigation. She has extensive experience in pretrial motion practice and has successfully assisted in the resolution of numerous employment-related disputes short of trial. In addition, Ms. Taylor has experience with appellate practice and can assist clients beyond the trial court level. Aside from litigation, she devotes time to counseling clients on employment practices and policies designed to avoid potential problems. Ms. Taylor is also a regular speaker on employment law matters to employers and other professional groups, and has been published in that practice area. She is a member of the Dallas Bar Association – Labor and Employment Section, the American Bar Association, the State Bar of Texas and the Ohio State Bar Association. Ms. Taylor earned her B.S. degree, *magna cum laude*, from Texas Woman's University and her J.D. degree, with distinction, from Ohio Northern University.

Teresa Thompson has been with Gevity for nine years and has been in the human resources outsourcing industry for about 15 years. Gevity is a 23-year-old publicly traded company and is the leader in the HR outsourcing and PEO industry in America. Ms. Thompson currently holds the position of major account business development manager and is in the chairman's circle of Gevity. She also serves on the Business Development Managers Council. Ms. Thompson earned a B.A. degree in mass communications from Ouachita Baptist University in Arkadelphia, Arkansas. Ms. Thompson can be reached at (972) 444-0259, ext. 246.

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Thank you.

General Information

Dallas, Texas • July 19, 2007

Holiday Inn Select Love Field • 3300 W. Mockingbird Lane

Registration: 8:00 am – 8:30 am • Session: 8:30 am – 4:45 pm

Lunch Break: 12:00 pm – 1:00 pm (On Your Own)

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Business Immigration Law – Business and Work Visas; The Green Card Overview: The Employer's and Alien Employee's Journey Through the Permanent Residence Process; A Brief Survey of U.S. Taxation of Foreign Nationals Working in the U.S.; Form I-9, Employment Eligibility Verification.

Faculty: Robert W. Alcorn, M.B.A., CPA, Offices of R.W. Alcorn, CPA; Richard A. Gump Jr., Brent T. Huddleston; Charla Truett, Law Offices of Richard A. Gump, Jr.; Harry J. Joe, Jenkins & Gilchrist, A Professional Corporation. ©2007. 262 pages.

Item: 373234TMX	CD and Manual	\$139
373234MAN	Manual Only	\$69
373234EMN	E-Manual Only	\$69

Assessing Your HR Policies and Practices: Compliance With State and Federal Employment Laws – The Hiring Process; Monitoring Employees in the Workplace – Can an Employer Lawfully “Spy” on Its Employees; Termination of Employment; Handbooks: Is Yours Doing the Job; Employee Discipline and Terminations: How to Avoid a Lawsuit; Requirements for Severance Agreements Under ADEA/OWBPA.

Faculty: Jarrett R. Andrews, Winstead Sechrest & Minick P.C.; Steven L. Mierl, Cornell Smith & Mierl, LLP; David Pope, SPHR, DHP Consulting. ©2006. 86 pages.

Item: 368795MAN	Manual Only	\$69
368795EMN	E-Manual Only	\$69

Family and Medical Leave Act – Terminating Employees While They Are Talking FMLA Leave; Information and Notice Requirements; Handling Employee Terminations Under the FMLA; Serious Health Conditions and the Certification Process; Interplay Between FMLA and Other Laws.

Faculty: Lenore L. Espinosa, Karla A. Evans, J. Alfred Southerland, James R. Staley, Ogletree, Deakins, Nash, Smoak & Stewart, P.C. ©2006. 248 pages.

Item: 370762TMX	CD and Manual	\$139
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This seminar will encompass the new regulations recently passed. The faculty will cover the new laws surrounding health savings accounts, nondiscrimination under HIPAA, plan application for military reserve and new mental health laws.

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- Legal requirements for health plans
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- Health benefit strategies for small groups
- Wellness and disease management strategies

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This seminar has been reviewed and approved for inclusion in the Human Resource Professional Development™ Certificate Program and qualifies for 1.0 credit. Each seminar that qualifies for credit toward the HRPD Certificate has been approved by an advisory board made up of leading law firms in the employment industry. The law firms residing on the advisory board are Jackson Lewis LLP, Littler Mendelson and Epstein Becker & Green, P.C. Please visit www.lorman.com/certification/hrpd for more information.

Pending registration by the Texas Department of Insurance.

This seminar qualifies for 8.0 PACE credit hours for CLU, RHU, REBC, CLF and ChFC.

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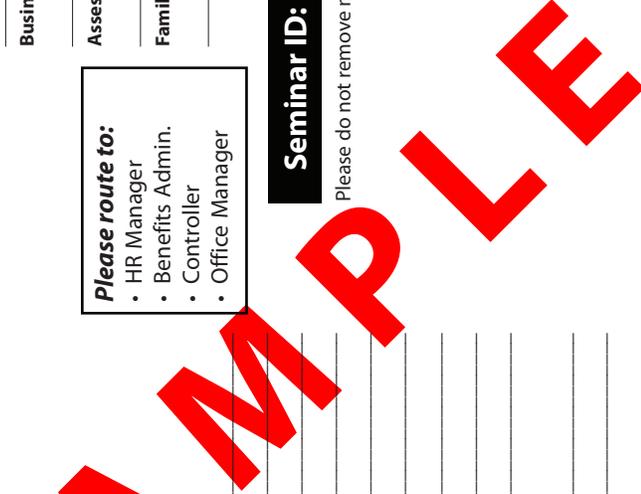
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