

Cancellations must be received in writing and emailed by April 15 at Noon

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NE Ohio Health Underwriters Association | 28022 Osborn Road, Cleveland, OH 44140

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NE Ohio HUA <neohiohua@gmail.com>

NEOHUA April 17th Program to offer 3 CEs

1 message

Northeast Ohio Health Underwriters Association <neohiohua@gmail.com>
 Reply-To: neohiohua@gmail.com
 To: neohiohua@gmail.com

Fri, Mar 15, 2019 at 2:20 PM



Northeast Ohio Health Underwriters Association

Wednesday, April 17, 2019
 8:00 am - 12 Noon
 Brecksville Community Center

Alternative Funding and Captives presented by **Gene Pompili and Michael Schroeder of Roundstone**

1CE applied for

This course is intended to educate advisors on the mutual benefits of switching their middle market employer clients (20 - 1,000 employees) from fully insured to self-funded through a medical captive model. Advisors will learn how this alternative funding strategy can enhance their value with existing clients as well as attract new clients by delivering a cost saving solution that offers flexibility and control over healthcare spend.

Dental and the Whole Body Health Connection presented by **Dan Feiwell of Anthem BCBS**

1CE approved

Disability Basics presented by **Dan Feiwell of Anthem BCBS**

1 CE approved

Cost to attend:
 NEOHUA members and NAHU members - \$10
 Non-members - \$50
 Reservations are required
 Brecksville Community Center
 1 Community Drive
 Brecksville, OH 44141
 Full buffet breakfast

[Click here to register online](#)

If you are a NEOHUA Member (or a member of another OAHU chapter) you are eligible for 1 Membership CE credit.

Be sure to ask Rich Muccio, our CE Chair how you can take advantage of this offering



Continuing Education Course

Title: Alternative Funding and Captives

Description:

This course is intended to educate advisors on the mutual benefits of switching their middle market employer clients (20 – 1,000 employees) from fully insured to self-funded through a medical captive model. Advisors will learn how this alternative funding strategy can enhance their value with existing clients as well as attract new clients by delivering a cost saving solution that offers flexibility and control over healthcare spend.

Outline:

- I. Introduction (10 minutes)
 - a. About Roundstone
 - b. Current Trends in Healthcare Costs

- II. Self-Funding (20 minutes)
 - a. General Overview and Comparison to Level Funding & Fully Insured
 - b. Self-Funding Captive Defined

- III. Roundstone's Medical Captive (20 minutes)
 - a. How It Works
 - b. Long-Term Outlook
 - c. Case Studies

- IV. Questions/Closing (10 minutes)

- V. Evaluations (5 minutes)

Total Time: 1 Hour for Course Content + 5 Minute Evaluation

Ohio Department of Insurance Continuing Education Program Course Approval Application

Provider Name		Provider Number	
Course Title (maximum 40 characters) <i>ALTERNATIVE FUNDING AND CAPTIVES</i>		Course Number (Leave Blank)	
Course Type: (check one) <input type="checkbox"/> Self-study <input checked="" type="checkbox"/> Classroom <input type="checkbox"/> Distance Learning	For classroom only, how will this course be taught? (check all that apply) <input checked="" type="checkbox"/> Lecture <input type="checkbox"/> Panel Discussion <input type="checkbox"/> Workshop <input type="checkbox"/> Video/TeleConference <input type="checkbox"/> Other _____	Fee option: <input type="checkbox"/> Flat <input checked="" type="checkbox"/> Individual <input type="checkbox"/> Limited	Number of credit hours requested <div style="text-align: center; font-size: 2em;">/</div>
Is this course open to the industry? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Line of concentration: <input checked="" type="checkbox"/> General <input type="checkbox"/> Title <input type="checkbox"/> Bail Bond <input type="checkbox"/> Ethics <input type="checkbox"/> LTC-4 <input type="checkbox"/> LTC-8 <input type="checkbox"/> Annuities		
<p>For all courses: Attach refund policy and tuition.</p> <p>For Classroom courses: Attach a comprehensive course outline and bibliography. Annotate the outline indicating, for each section, the number of minutes of instruction that will be offered and the method of presentation for each component.</p> <p>For Self-Study courses: Include study materials, exam procedures and sample exam.</p> <p>For Interactive Online Self-Study courses: Include study materials, access to view course online and justification that course meets basic requirements.</p>			
Has this course been previously approved by Prometric in another state? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		If so, provide Prometric-issued course number.	
I, the undersigned, do hereby certify that all information provided herein is true and correct.			
_____ Printed/Typed Name of Authorized Provider Official		_____ Signature	
		_____ Date	

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