CONTRARIAN RE
FALL 2017 MEMBERS’ MEETING

SEPTEMBER 26-27, 2017 | NASHVILLE, TN
WELCOME!

As you know, Contrarian is not just a smart risk structure and sound financial decision; it is an alliance that allows our Members to support each other through an interconnected community. Each Members’ Meeting is a compelling reminder that the most rewarding and powerful moments for the captive are those that you create, share and experience together; indeed, this collaboration is what makes Contrarian “more than just a captive.”

This Members’ Meeting will feature new elements and expanded content. We will devote more time and attention to the unique perspective of healthcare providers, including the hurdles and issues they face and their ideas to improve the delivery of healthcare in the United States. This educational foundation will lead to action as, over the coming years, Pareto Captive Members will form concrete relationships with healthcare providers. Consider attending the “Master Class” session which will focus on direct contracting with hospitals and other providers.
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<td>12:00 p.m. – 8:00 p.m.</td>
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<td>Entrance Hall, Level 2</td>
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<td><strong>TUESDAY, SEPTEMBER 26</strong></td>
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<td>7:00 a.m. – 7:45 a.m.</td>
<td>Bootcamp Workout</td>
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<td>9:25 a.m. – 10:00 a.m.</td>
<td>The Provider's Prospective</td>
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<td>10:10 a.m. – 10:50 a.m.</td>
<td>Issue Symposium: Mental Health</td>
<td>Issue Symposium: How to Start/Execute</td>
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<td>11:00 a.m. – 11:30 a.m.</td>
<td>Closing Remarks</td>
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<td>11:30 a.m. – 1:00 p.m.</td>
<td>Prospect Lunch</td>
<td>Contrarian Members &amp; Board Meeting</td>
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Please plan to visit the Pareto Hospitality Suite located on the Gulch level. It will open at 8:00 am on Tuesday and remain open for the duration of the Members’ Meeting. If you arrive early, please join us in the Hospitality Suite for a continental breakfast. Refreshments and other snacks will be available throughout the day. The Hospitality Suite will feature representatives from the various exhibitors featured at the meeting – please stop by to hear more about their programs. It is also the site of charging stations, private meeting space, and the “Lucy Booth” attorney consult sessions.

**AGENDA**

**MONDAY, SEPTEMBER 25**

12:00 p.m. – 8:00 p.m.  
**Early Bird Registration**

The registration desk will be open for early-bird check-in. If you’re in town early, please stop by to register. You’ll avoid the rush and get a warm welcome to Nashville from your Pareto friends!

**TUESDAY, SEPTEMBER 26**

8:00 a.m.  
**Registration**

Registration will open at 8:00 am and remain open for the duration of the event. Please register and pick up your meeting materials. A light breakfast will be available in the Hospitality Suite.

8:00 a.m. – 9:00 a.m.  
**Group Yoga**

Meet in the lobby of the Westin at 7:45 a.m. to join us for a poolside group yoga session (weather permitting). This promises to be a great event to jump-start your day! All abilities welcome.

10:45 a.m. – 11:45 a.m.  
**Captive 101**  
*Andrew Clayton*, Pareto Captive Services

This pre-meeting program is open to new and prospective Members and anyone else who wants a review of the basics. The session will provide the background needed to optimize your experience at the Members’ Meeting, including an explanation of the captive structure and the parties and contracts involved. The session will also summarize the driving forces behind rising healthcare costs.

12:00 p.m. – 12:50 p.m.  
**General Lunch**

1:00 p.m. – 1:30 p.m.  
**Opening Remarks**  
*Andrew Cavenagh*, Pareto Captive Services

This session will provide an overview of Members’ Meeting content and logistics. It will update attendees on overarching goals and plans for the captives and Pareto’s global vision for the captive programs.
TUESDAY, SEPTEMBER 26

1:30 p.m. – 2:30 p.m.  **Cost-Containment: Ignited!**
10 speakers. 5 minutes each. Slides automatically advance every 15 seconds. In rapid succession, each speaker will teach you about a different cost-containment program available to Pareto Captive Members. Decide which interest you and follow-up with the speakers in the Hospitality Suite later for a more in-depth discussion and instructions on how to implement the program.

2:30 p.m. – 3:10 p.m.  **The Room Where It Happens**
Listen as the top MCCI scorers discuss the keys to their success, challenges they overcame, and plans for the future. We will ask the highest performing Members to take center stage and converse about their efforts.

3:20 p.m. – 3:40 p.m.  **Round Table Snacks**
Take a break! Peer interaction is one of the great benefits of captive membership and a highlight of these Members’ Meetings. Enjoy a snack and use this opportunity to meet and collaborate with your fellow attendees.

3:50 p.m. – 4:50 p.m.  **Novice Bootcamp**
*Kristen McKenna*, Pareto Captive Services
You transitioned from the fully insured world to that of self-insurance – now what? This session will introduce you to elementary programs and plan design options that can be easily implemented during your first year in the captive. If this is your first Members’ Meeting and/or you are a new captive Member, we strongly encourage you to attend this session.

**Advanced Bootcamp**
*Andrew Clayton*, Pareto Captive Services
You have been in the captive for a year or more and implemented the basic cost-containment strategies and are charting your future plans. This session will encourage you to consider your next steps and guide you through implementation. You will hear expert legal opinion on plan design, tips on managing dialysis claims, and how to implement successful case management and utilization review. This session will outline three cost-containment bundles – from progressive to advanced to aggressive.

**Master Class**
*Andrew Cavenagh*, Pareto Captive Services
This session is designed for experienced Members who already accomplished the goals of the novice and advanced bootcamps. It will be an in-depth, practical discussion focusing on a program or initiative that is often identified by Members as “stretch goals.” The topic for consideration at this Members’ Meeting is direct contracting with hospitals and other providers.
TUESDAY, SEPTEMBER 26

5:00 p.m. – 5:40 p.m.  
**Springbuk Advanced**  
*Brooks Busch*, Springbuk  
This session is meant for those who already have a working knowledge of the Springbuk data analytics program. We will present exciting new features and give you ideas on how to interpret your data into an actionable and effective plan.

**Legal Updates**  
*Brian Johnston*, Jackson Lewis  
Learn about the latest legal developments relating to employee benefits that may impact you, as both a captive Member and employer.

**CFO Session: Show Me the Money**  
*John Naughton*, Keystone Risk Partners  
*Joel Pina*, Keystone Risk Partners  
Questions about captive financial reports? Tax implications of captive membership? Capital accounts and distributions? This session is an opportunity to discuss “all things financial” and have your questions answered by two of captive’s accountants.

6:30 p.m. – 10:30 p.m.  
**Members’ Gala** – The Bell Tower, 400 4th Avenue South  
Join us for an evening of festivities at the “The Bell Tower!” Cocktail hour begins at 6:30 p.m. followed by dinner and a singer-songwriter performance. Musical entertainment, dancing, and whiskey tastings will follow dinner!

WEDNESDAY, SEPTEMBER 27

7:00 a.m.  
**Bootcamp Workout** – Lobby  
Meet in the lobby of the Westin and join us for a bootcamp-style workout! All abilities are welcome.

8:30 a.m. - 9:15 a.m.  
**General Breakfast**  
Join us for breakfast! Seating will give you one of two options: some tables will have suggested conversation topics, but for those of you who had a bit too much moonshine last night, some tables will be designated as “let me sit quietly and eat in silence” tables.

9:25 a.m. – 10:00 a.m.  
**The Provider’s Prospective**  
*Speaker*, TBA  
We devote a lot of time thinking about healthcare from a patient and employer perspective - now hear the provider’s perspective. You will learn how to be a smarter consumer of healthcare, and you will gain insight into the future of healthcare delivery in the country.
**Issue Symposium: Mental Health**
*Speaker*, TBA

This session focuses on mental health, how mental health issues impact overall healthcare spend, and emerging solutions to contain costs.

**Issue Symposium: How to Start/Execute**

If you are searching to understand where to begin, or find yourself grappling with developing a strategic written plan, this session is for you. This session is intended to be a Member-led discussion of how to create the framework for a long-term strategy.

**Issue Symposium: How to Communicate**

If you are searching to understand where to begin, or find yourself grappling with developing a strategic written plan, this session is for you. This session is intended to be a Member-led discussion of how to create the framework for a long-term strategy.

**Closing Remarks**

*Andrew Cavenagh*, Pareto Captive Services

This session will tie together lessons learned over the course of the Meeting and offer suggestions for turning the plethora of new information into an actionable plan.

**Prospect Lunch**

Prospective Members and their consultants are invited to join Andrew Clayton for lunch. We will discuss lessons learned, future steps, and answer lingering questions before you depart.

**Contrarian Members & Board Meeting**

This working lunch is for the Contrarian captive to consider captive-specific matters and provide input to Pareto. *Please note: this is a closed session open only to current Contrarian Members and Board Members, not to consultants or prospective Members.*

**General Lunch**

For those who are not part of the Contrarian working lunch or the Prospect lunch, please join us at the General Lunch prior to your departure.

**Contrarian Board Meeting**

This meeting is for the Contrarian captive to consider captive-specific matters and provide input to Pareto. *Please note: this is a closed session open only to Current Contrarian Board Members.*
Pareto Captive Services forms and manages employee benefit group captives that allow employers to reduce costs and increase control over employee benefit programs.

We serve as the management team of the group captive, representing the interests of the group. We offer select employers with between 50 and 500 employees access to existing group captives and we create new group captives for groups of employers. We assist the group captive choose a policy issuing carrier, negotiate the reinsurance agreement, and underwrite new and renewal members. We work with the employers to develop and execute a multi-year business plan and provide management reports and tools to measure progress of the plan.

Since we are not a broker or an insurance company, we are not conflicted by also representing individual employers as their broker or by also underwriting on behalf of the insurance carrier. We’re focused only on the performance of the group captive.