

AmeriBen/ IEC Group

43rd Annual Management Conference



Sun Valley, Idaho

September 28-30, 2011

CONFERENCE DETAILS

We invite you to attend the 43rd Annual AmeriBen/IEC Group Management Conference located in beautiful Sun Valley, Idaho. Refresh and relax while learning and sharing best-practices of “what works” in today’s diverse industries. You will have the opportunity to attend workshops presented by experienced subject-matter experts regarding topics that include: Employee Benefit Plan Administration, Retirement Plans, Human Resources, and Organizational Performance. The conference is not all work and no play, as there are opportunities to enjoy organized activities such as our ever-popular golf scramble or a fly-fishing excursion. You may even venture off on an adventure of your own. Mark your calendar for September 28 - 30, 2011 — this is the conference you don’t want to miss!

REGISTRATION INFORMATION

Registration fee of \$595 per person includes:

- Your choice of workshops including all materials
- Inspiring messages from nationally-recognized keynote presenters
- Networking opportunities, entertainment, and meals
- Information from a wide variety of exhibitors

Guests are also welcome! The guest registration fee of \$175 includes admission to keynote presentations, entertainment, and meals.

ACCOMMODATIONS AVAILABLE AT SUN VALLEY RESORT

Call Sun Valley Resort and book your room before August 8th— mention the discount code “IEC11” for reduced room rates. Call (800) 786-8259 or visit Sun Valley Resort’s website at:

www.sunvalley.com/go/groups/AmeriBenIEC.html

CONTACT US

Toll Free: (800) 786-7930 x 1385

Phone: (208) 955-1385

REGISTER TODAY!

Visit our website at:

www.ameribeniecgroupp.com/mgmtconf

CONFERENCE AGENDA

WEDNESDAY, SEPTEMBER 28, 2011

11:00 am: Guided Fly-Fishing Pickup Time

11:00 am: Golf Scramble Tee Time Start- *Sponsored by*

4:00 pm - 9:00 pm: Registration

6:30 pm - 9:00 pm: Welcome Event



THURSDAY, SEPTEMBER 29, 2011

7:30 am - 8:30 am: Breakfast & Registration

8:30 am - 8:35 am: Welcome & Announcements

8:35 am - 9:50 am: **Opening Keynote**—Chuck Lenz and Dr. John Hensing, Banner Health

9:50 am - 10:05 am: Break - Visit Sponsors

10:05 am - 11:05 am: **Concurrent Workshops I**

Healthcare from a Carrier Perspective

It Could Happen to You—What Clients are Asking the Resource Center & the Advice We Give

Retirement Roundtable

11:05 am - 11:15 am: Break - Visit Sponsors

11:15 am - 12:15 pm: **Concurrent Workshops II**

Healthcare Reform Roundtable

Leveraging Your Company Culture to Achieve Your Organization’s Strategic Goals & Objectives

What Will be the Biggest Trends in the Retirement Industry Landscape Over the Next 5 to 10 Years?

12:15 pm - 12:30 pm: Break - Visit Sponsors

12:30 pm - 1:30 pm: **Luncheon Keynote**—T. Andrew Fujimoto, AmeriBen/IEC Group
The Business Environment and AmeriBen/IEC Group

1:30 pm - 1:45 pm: Break - Visit Sponsors

1:45 pm - 2:45 pm: **Concurrent Workshops III**

Current ERISA and DOL Events

Social Networking - Making it Work for Your Own Professional Growth & Development

Accountable Care Organizations: Health Delivery Systems of the Future or Mystical Unicorns?

2:45 pm - 3:15 pm: Break - Visit Sponsors

6:00 pm - 7:00 pm: Cocktail Hour & Appetizers - *Sponsored by*

7:00 pm - 9:30 pm: Dinner & Entertainment at Trail Creek Tent Pavilion

FRIDAY, SEPTEMBER 30, 2011

7:30 am - 8:30 am: Breakfast & Visit Sponsors

8:30 am - 9:30 am: **Concurrent Workshops IV**

Healthcare Reform: Join the PPACA PParty!

The Leadership Challenge

9:30 am - 10:55 am: **Closing Keynote**—V.J. Smith, Life’s Great Moments



A young boy walked along a beach littered with thousands of starfish, beached and dying after a storm. When he came to a starfish, he picked it up and threw it back into the ocean.

A man approached him and said, "Why do you bother? There are too many of them, you can't possibly make a difference!"

The young boy bent down, picked up another starfish, and hurled it back into the ocean. "I made a difference to that one," he said.

- Loren Eisley-



**Join us in
beautiful Sun Valley!**

KEYNOTE PRESENTERS

CHARLES P. LEHN

Vice President Managed Care and Benefits Administration, Banner Health

DR. JOHN HENSING, MD

Executive Vice President, Chief Medical Officer, Banner Health
Integrating the Financing and Delivery of Health Care



The presentation will focus on the evolving roles of providers, payers, plan sponsors and other purchasers in the private and governmental sectors of healthcare. The necessary combination of growth, member experience, quality of care, operational performance and provider alignment to achieve a sustainable healthcare system will be explored. Lehn and Hensing will also describe the critical success factors for integrated delivery and financing models and new competencies necessary to thrive in a new health care environment.

Chuck Lehn is Vice President Managed Care and Benefits Administration for Banner Health, a non-profit health system serving seven western states. In this role, he is responsible for system managed care and accountable care strategies, Banner MediSun, a 20,000 member Medicare Advantage Plan, Banner Physician Hospital Organization, a 650 member physician organization aligned with Banner since 1989, and Banner employee benefits administration. Mr. Lehn graduated in 1984 from Minnesota State University, Moorhead with a BS in Finance and Accounting and earned a Masters Degree in HealthCare Administration from the University of Minnesota in 1992.

Dr. Hensing joined Samaritan Health System (SHS) as Senior Vice President of Medical Services in 1995, and assumed his current role with Banner in 2000. His current responsibilities include the division of care management for Banner, including system-wide clinical improvement, medical management, care coordination, case management and management engineering. He also oversees Risk Management, Clinical Innovation and Remote Presence Technology, Clinical Education, Clinical and Medical Informatics, Clinical Delivery and Banner Research. Dr. Hensing practiced internal medicine in Tempe, Arizona for 18 years and was awarded the Arizona Distinguished Internist of the Year Award in 1993. He is a Fellow in the American College of Physicians and a member of the American College of Physician Executives.

V.J. SMITH

Author, Professional Speaker, Life's Great Moments
The Richest Man in Town



V.J. Smith will take audience members on an emotional rollercoaster as he speaks about the life of "Marty", a wonderful man who ran a cash register at Walmart. He was considered rich because he was loved and respected, but most of all, he was content with every aspect of his life, no regrets. Marty's simple philosophies show what happens when you take the time to be kind and compassionate. All that you give, you get back, and more.

Smith has been a professional speaker for more than a decade. Drawing on lifetime experiences, Smith peppers his talks with anecdotes and personal stories to illustrate key points. Smith graduated in 1978 from South Dakota State University. Smith is the author of the book [The Richest Man in Town](#).

T. ANDREW FUJIMOTO

CEO, AmeriBen/IEC Group
The Business Environment and AmeriBen/IEC Group



Part of strategic planning is a business environmental scan. The dynamic nature and alchemy of such elements as the economy, legislation, litigation, competitors, generations, workforce, and financing are taking business in what could be considered to be an unprecedented course. Join Andy Fujimoto for an overview of these areas and glimpse into how AmeriBen/IEC Group is strategically positioning itself.

Andy has been instrumental in forging AmeriBen/IEC Group into one of the most widely respected management consulting and group benefits third party administration firms in the nation.

WORKSHOP DESCRIPTIONS

THURSDAY, 10:05 am - 11:05 am

Healthcare from a Carrier Perspective

Richard Hannon, Retired Sr. Vice President Marketing and Provider Affairs, Blue Cross Blue Shield of Arizona

American healthcare has been “managed” to the point that it needs significant repair; the real concern is what is really broken and what isn’t. How do we fix the problems so cost and access are both meaningfully addressed, but we don’t end up with a bureaucratic mess in Washington?

Mr. Hannon retired as Senior Vice President of Marketing and Provider Affairs at Blue Cross Blue Shield of Arizona on April 1, 2011. In that position, he oversaw the organization’s marketing and provider network management activities. He was also responsible for the company’s local and national legislative programs.

It Could Happen to You—What Clients are Asking the Resource Center & the Advice We Give

Sarah Stevens, Human Resources Consultant, AmeriBen/IEC Group and Kira Barsotti, Human Resources Consultant, AmeriBen/IEC Group

Wouldn’t it be great to know what challenges other companies are facing and to realize that your business is not alone? IEC Group’s Human Resource Consultants will provide a unique opportunity by sharing numerous HR-related questions they receive from clients, as well as the answers to those questions. Topics will range from the routine to the complex to the occasionally bizarre issues facing employers today.

Retirement Roundtable

Deborah Mather, Facilitator, Retirement Administration Manager, AmeriBen/IEC Group

Topics that will be moderated by Ms. Mather will include:

- How do I invest my retirement money in the stock market and still sleep at night?
- How do 401(k) plan participants make investment decisions?
- Investment advice or employee education: Are you a naked fiduciary?

11:15 am - 12:15 pm

Healthcare Reform Roundtable

Jon Aubrey, Senior Vice President of Account & Business Development, AmeriBen/IEC Group

How is healthcare reform affecting you as an individual and as an employer? How will it affect you in the future? What elements of reform are most concerning as an employer? What are you excited about? These and other questions will be discussed in a fun and relaxing roundtable environment. Be prepared to share your ideas and listen to what others have to say about the future of employer-sponsored health care benefits.



Leveraging Your Company Culture to Achieve Your Organization’s Strategic Goals & Objectives

Kurt Williams, Independent HR & Management Consultant, AmeriBen/IEC Group

The culture of an organization influences everything and everyone in it. A culture that is well-defined, well-developed and well-supported creates positive opportunities. Understand and nurture a culture and it will provide improvements in many areas. Failure to define, understand, and nurture a culture, leaves you with nothing more than a meaningless platitude. This session will explore real examples of organizational culture which support and promote the achievement of strategic goals and objectives. You will learn how to define, develop, and leverage your organization’s culture to ensure your mission and vision statements are more than happy lies.

What Will be the Biggest Trends in the Retirement Industry Landscape Over the Next 5 to 10 Years ?

Steven McCormick, Senior Vice President, John Hancock Retirement Plan Services

All Americans are facing an increased responsibility to secure their own financial futures as we continue to recover from a global economic crisis. To meet these challenges, retirement plans of the future must offer inclusive, comprehensive approaches to help participants plan for, accumulate, and create a lifelong retirement income stream. This informative session will discuss the greatest trends in retirement over the next decade and how leaders can help their employees navigate these troubled waters.

Luncheon Keynote, 12:30 pm - 1:30 pm

The Business Environment and AmeriBen/IEC Group

T. Andrew Fujimoto, CEO, AmeriBen/IEC Group

Part of strategic planning is a business environmental scan. The dynamic nature and alchemy of such elements as the economy, legislation, litigation, competitors, generations, workforce, and financing are taking business in to what could be considered to be an unprecedented course. Join Andy Fujimoto for an overview of these areas and glimpse into how AmeriBen/IEC Group is strategically positioning itself.

1:45 pm - 2:45 pm

Current ERISA and DOL Events

Devitt Barnett, Attorney, Thorson, Barnett & McDonald

New DOL guidelines have been in the works for years and are primarily a result of the many fees that are commonly associated with the average 401(k) plan. Devitt Barnett, ERISA attorney and partner with Seattle law firm Thorson, Barnett & McDonald, P.C., will speak to the U.S. Department of Labor section 408(b)(2) Fee Disclosure Regulation and will offer ERISA and DOL current events.

Continuing education credits will be available for qualified workshops.



Social Networking – Making it Work for Your Own Professional Growth and Development

Mimi Henninger, Facilitator, Human Resources Consulting Division Manager, AmeriBen/IEC Group

Business professionals today are leveraging social media like never before. Utilization includes recruiting, job searching, networking, reconnecting, researching trends and competition, and marketing. Come ready to discuss and learn about ways that you too can better utilize social networking for your own professional growth and development.

Accountable Care Organizations: Health Delivery Systems of the Future or Mystical Unicorns?

Ben Wright, Chief Financial Officer & Vice President of Strategic Initiatives, AmeriBen/IEC Group

Some joke that Accountable Care Organizations (ACOs) are like unicorns; everyone knows what they look like, but nobody has seen one in real life. In this session, we will review the pros and cons of ACOs, some of the barriers that presently exist, the impact of PPACA on ACOs, and the likelihood of ACOs becoming a viable delivery model or whether this is a concept that will pass with the wind.

FRIDAY, 8:30 am - 9:30 am

Healthcare Reform: Join the PPACA PParty!

Josh Sears, Corporate Counsel, AmeriBen/IEC Group

Join Josh as he reviews how the Patient Protection and Affordable Care Act (PPACA) has changed the healthcare insurance landscape since its passage in March 2010. Explore the opportunities and hazards that await health insurance plans as Josh dissects the reforms scheduled for the future, as well as how current events, politics, and the industry will affect what lies ahead.

The Leadership Challenge

Jennifer Fernandez, SPHR, Human Resource Director, Insight Benefits & HRIS

Consider this a personal coaching hour for all you leaders out there! Jennifer will reaffirm what strong leaders do, reiterate the fundamental principles that support the core leadership practices, provide examples of real people in real situations, demonstrate each leadership practice and offer specific recommendations on what every leader can do to assimilate these practices and continually develop their capabilities as a leader. *Presentation based on the leadership research done by Kouzes & Posner.*

CONFERENCE ACTIVITIES:

Registration is required for each activity. All activities take place on Wednesday, September 28, 2011.

ANNUAL GOLF SCRAMBLE

\$120 per person—11:00 am Tee Time

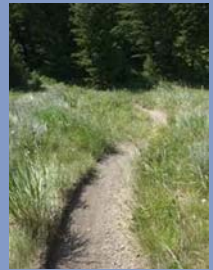
Golf enthusiasts of all levels can sign up to experience a true summer getaway at the AmeriBen/IEC Group & Coalition America Golf "Scramble" Tournament. Take refuge on the 18 holes of Sun Valley's magnificent golf course. This 72-par masterpiece consistently ranks among the nation's top resort courses and was ranked #1 in Idaho by Golf Digest. Golfers will be able to purchase mulligans with donations going to Big Brothers Big Sisters of Southwest Idaho. All money raised will be matched by AmeriBen/IEC Group, Coalition America, and various conference sponsors. Clubs are available for rent.



HIKING

No Charge — 1:00 pm Start Time

During your visit to beautiful Sun Valley, take the time to experience Dollar Mountain. This mountain is open to sight-seers all summer long; whether you want a relaxing day or a challenging journey through the beauty of Sun Valley's wilderness, this hike is the activity for you. Take the afternoon to follow a guide on a brisk hike on one of the trail systems. This hike is for all levels; hikers may turn back at anytime. If you are feeling adventurous, you can follow the guide to the top!



FLY FISHING

\$180 per person—11:00 am Pickup

Come fish the finest trout waters in the Western United States! The experts at Silver Creek Outfitters will take you to some of Idaho's most beautiful streams. The trip is limited to 3 anglers per guide. All necessary fishing equipment, lunch, and transportation to either the Big Wood River and its tributaries, or Silver Creek will be provided. Anglers will need to purchase an Idaho one-day fishing license (go to <http://fishandgame.idaho.gov/>).



OTHER ACTIVITIES OFFERED THROUGH SUN VALLEY RESORT

Participants must make arrangements for their own activities.

If you are interested in a relaxing afternoon at the spa or window shopping, Sun Valley is the ultimate venue, as it offers the perfect blend of business and relaxation. Activities include: mountain biking, horseback riding, bowling, swimming, tennis, day spa, and so much more. Contact Sun Valley Resort directly, or for more information, visit their website, www.sunvalley.com.

THANK YOU TO OUR SPONSORS



SUPPORT BIG BROTHERS BIG SISTERS OF SOUTHWEST IDAHO

AmeriBen/IEC Group has been a longtime partner with Big Brothers Big Sisters of Southwest Idaho in supporting the pairing of at-risk youth with one-on-one mentoring relationships. Last year during the conference, your purchases of mulligans at the golf scramble, along with individual and corporate donations, raised \$2,940 for Big Brothers Big Sisters in 2010, more than double the amount raised in 2009!

These generous donations help support the Big Brothers Big Sisters' mission of creating "little moments" that turn into "big magic". Children matched with a Big Brother or Big Sister for at least one year experience a wide range of benefits, including improved self-esteem and better relationships with peers.

Children who are matched are also 52% less likely to skip school, 46% less likely to begin using illegal drugs, and 27% less likely to begin using alcohol.

This year, we will once again be raising money for Big Brothers Big Sisters through mulligan purchases and donations. Be sure to stop by the Big Brothers Big Sisters exhibitor booth for more information about how you can help at-risk youth become our future leaders.



REGISTRATION & CANCELLATION POLICY

All participants are required to register for the conference and any conference-hosted activities. Cancellations must be made prior to September 5, 2011 for a full refund. Cancellations made after September 5, 2011 will be subject to a \$100 administrative fee. "No shows" will not be refunded any costs associated with their registration.

TO REGISTER:

Log on to: www.ameribeniecg.com/mgmtconf

Call Toll Free: (800) 786-7930 x 1385

Call Direct: (208) 955-1385

RESERVE YOUR ROOM AT SUN VALLEY RESORT:

Sun Valley Policy: One night advance deposit due upon booking. A \$25 cancellation fee will be charged for cancellations 30 days prior to stay. The full deposit will be charged for a notice less than 30 days. Call Sun Valley Resort and book your room before August 8th — mention the discount code "IEC11" for discounted room rates. Call (800) 786-8259 or visit : www.sunvalley.com/go/groups/AmeriBenIEC.html