

April 2016-March 2017 CE Presentations

April 2016

Todd Weiler Bio

Todd Weiler was born in Georgia, raised in the Chicago suburbs and lived in Germany for two years. He married Elizabeth Gordon in 1991 and they have 4 children. He has a business and a law degree from BYU, having graduated cum laude in 1996 from the J. Reuben Clark Law School where he served on law review. Todd litigated with downtown firms for 15 years, most recently with Dorsey & Whitney. In 2011, Todd went in-house with Logistic Specialties. He currently serves as LSI's Senior Vice President and General Counsel. Before joining the Utah Senate in 2012, Todd served on a city council, and was chair of his local chamber of commerce and county political party. Todd chairs the Retirement standing and appropriation committees, the confirmation committee and the Criminal Justice and Law Enforcement interim committee. He is also the vice chair of Senate Rules. Additionally, he sits on the Business and Labor and Judiciary standing committees, and on the Health and Human Services appropriation committee

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Tim Jackson Bio March 2016 Presentation

Tim Jackson, President of The Health Insurance Specialists and Licensed Health Insurance Agent

Tim graduated from the University of Utah with a Bachelor's Degree in Organizational Communications. Tim is passionate about helping people take care of their families by providing current information about health insurance. Tim has worked in the pharmaceutical and medical equipment field and has seen the need for individuals and businesses to have the right health insurance for their needs. Which is why he is passionate about helping clients by taking the confusing concepts of health insurance and offering simple and understandable solutions for small groups and individuals."

DOWNLOAD:

http://uahu.org/tim_jackson_april_2016_ethics_uahu_know_your_clients_presentation.pdf

July 2016

Quinn McKay UAHU Presenter July 2016

Quinn McKay is a partner in the Synthesis Consulting Group and recently an adjunct professor of business ethics at the University of Utah. He holds a doctorate in business administration from Harvard University and has extensive academic and professional credentials.

Academically, he has held an endowed chair at Texas Christian University, was the first MBA program director at Brigham Young University, and has been a visiting professor at the Universities of Lausanne, Switzerland; Ahmadu Bello, Nigeria; and Rangoon, Burma. Professionally, he has been a senior executive in many organizations, including the American Cancer Society (Utah division), Praxis Institute, Tracy Collins Bank & Trust, American Stores, and the Utah Health Cost Management Foundation.

McKay has been speaking and teaching about the principles of business and political ethics for over 30 years.

DOWNLOAD: http://uahu.org/quinn_mckay_bio_doc.pdf

August 2016

Greg J. Matis

Intermountain Healthcare
Legal Department
36 S. State Street #2200,
Salt Lake City, Utah 84111
(801) 442-3435
Greg.Matis@imail.org

Mr. Matis is Deputy General Counsel with Intermountain Healthcare. Before joining Intermountain, Greg also served as in-house counsel to several other organizations, including First Health, the country's largest third-party administrator. Prior to that, he was associated with the Salt Lake City law firm of Kimball, Parr, Waddoups, Brown & Gee.

He frequently speaks and writes on healthcare-related topics. He is an adjunct professor at the J. Reuben Clark Law School at BYU, where he teaches health law and policy. He serves on the Board and Executive Committee of the Economic Development Corporation of Utah.

Greg clerked for the Honorable Stephen H. Anderson of the Tenth Circuit U.S. Court of Appeals. He graduated, *with honors*, from the University of Chicago Law School, where he was on the managing board of the *University of Chicago Law Review*. He also has a B.A., *magna cum laude*, from Brigham Young University.

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September 2016

Steve Hunt Bio (September 2016 Presenter)

Steve Hunt oversees business development efforts at Infinisource. He received his degree in Business Information Systems from Utah State University. He has been an active trusted advisor over the past 12 years in various marketing roles including Human Capital Management. His experience includes working with various partner/broker relationships throughout the country advising of the most recent technology trends that are enabling employers to manage their employees.

In his free time, he enjoys spending time with his family, cycling, and being outdoors.

DOWNLOAD: http://uahu.org/steve_hunt_presentation_sept_2016.pdf

Mariangela Noyes

Account Executive - PlanSmart at MetLife mnoyes@metlife.com

Metropolitan Life Insurance Company, New York, NY 10166. Variable products distributed by MetLife

Investors Distribution Company (MLIDC) (member FINRA). Both are MetLife companies

Experience

Account Executive - PlanSmart at MetLife

May 2011 - Present (5 years 4 months)

As a PlanSmart Account Executive/Director, I focus on the sale and successful delivery of our PlanSmart programs including RetireWise, Transition Solutions, Delivering the Promise and a variety of topic-focused workshops. I develop and manage strong relationships with new and existing customers by providing financial wellbeing programs to complement their benefits, retirement and holistic wellness programs and partner with benefits brokers and consultants in bringing wellbeing strategies and solutions to meet their customers' needs. I work closely with my MetLife partners in support of the sales and service strategy developed for my geographic region to drive results for sales goals and growth.

Client Executive at MetLife

August 1987 - April 2011 (23 years 9 months)

Group Representative at Great West Life

July 1986 - August 1987 (1 year 2 months)

Education

Cornell University

BS, Human Development; Consumer Economics, 1982 - 1986

Activities and Societies: Kappa Delta

[Contact Mariangela on LinkedIn](#)

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October 16, 2016

Stephen D. Neeleman, MD

FOUNDER / VICE CHAIR

Dr. Stephen Neeleman is the Founder and Vice Chairman of HealthEquity. Steve founded HealthEquity in 2002, with the vision to repair the fractured relationship between patients and their physicians and to help more people obtain quality health insurance by re-introducing consumerism to health care. Steve is the co-author of *The Complete HSA Guidebook—How to Make Health Savings Accounts Work for You*, in its 5th Edition.

In addition to his duties as Founder and Vice Chairman of HealthEquity, Steve is currently a practicing general and trauma surgeon for Intermountain Healthcare at American Fork Hospital and Utah Valley Regional Medical Center. As a board-certified physician, Steve brings his passion and firsthand knowledge from the practice of medicine to his leadership role at HealthEquity.

Steve was appointed by Utah's Governor, Gary Herbert, to serve as a board member of HIP Utah, Utah's high-risk insurance pool. He also serves on the Council for Affordable Health Insurance HSA Working Group, and on America's Health Insurance Plans' HSA Leadership Council.

Prior to his medical training, Steve worked as the General Airport Manager for Morris Air (later acquired by Southwest Airlines), based in Salt Lake City, Utah. Steve helped combine efficiency, technology, and excellent customer service to succeed in a rocky industry. This innovative business model allowed Morris Air to rise above financially struggling competitors. Steve's goal is to use this model to help save another struggling industry—health care.

Steve completed his undergraduate degree and played football at Utah State University. He attended medical school at the University of Utah and completed his surgical training at the University of Arizona. Steve also served as an assistant professor of surgery at the University of Arizona.

DOWNLOAD: http://uahu.org/stephen_neeleman_oct_2016.pdf

January 2017

Ken Spencer, SPHR, MHRM
President and CEO
HR Service, Inc. & ERISA Solutions
E-Mail: Ken@hrserviceinc.com
Phone: Toll-free #: (855) 447-3375, Ext 6

Ken has over 30 year's professional compliance and human resource management experience working in manufacturing, software development, banking and consulting.

Mr. Spencer formed HR Service, Inc. and ERISA Solutions in 2004 providing extensive compliance, ERISA and HR solutions for clients and brokers across the country. HR Service, Inc. and ERISA Solutions provide compliance, employee notices, 125 POPs, SPD Wraps and HR solutions for thousands of clients in every state. HR Service, Inc. is a certified solutions provider for United Benefit Advisors and member of the National Association of Health Underwriters.

Ken taught compliance, leadership and HR courses for 8 years at Westminster College, and taught employment law for the University of Phoenix.

Mr. Spencer earned a Master's degree in Human Resource Management from the University of Utah, and holds Bachelor's degrees in Marketing and Finance.

Mr. Spencer was certified in change management techniques, and is a certified Senior Professional in Human Resources (SPHR) through the HRCI.

DOWNLOAD: http://uahu.org/jan_2017_spencer_extraordinary_brokers_final.pptx

Mike Sonntag

Bio

Mike Sonntag attended BYU where he received a degree in Business Finance. Upon graduation he worked 8 years for State Farm in operations adjusting property and casualty claims.

Mike eventually joined his father and sister and other family members at the Sonntag Group, where he managed the real estate division. Following his dad's passing in 1997, Mike started representing his dad's insurance clients at the Legislature.

Following his sister's departure from Sonntag Group, Mike renamed the business Sonntag Government Affairs and has since been its chief lobbyist.

Mr. Sonntag represents UAHU, NAIFA and Bear River Insurance at the Utah Legislature.

DOWNLOAD: http://uahu.org/day_on_the_hill_2017_rev.pdf

February 2017

Rebecca D. Miller
Vision Market Solutions

As the Regional Market Consultant for the East Coast, Rebecca focuses on UnitedHealthcare's Vision business and provides subject matter expertise for our Sales and Account Management Teams. With emphasis on sales strategy, competitive positioning, sales training, broker meetings and key client presentations, Rebecca works internally and externally to drive sales and persistency. As a former Account Manager, Rebecca has an unrelenting focus on the customer and member experience. With over 10 years of industry experience, Rebecca brings passion and creativity to her role. She currently supports 11 major markets as well as the National Account Team. Prior to joining UHC Rebecca worked for Assurant Employee Benefits in St. Louis, MO and Chicago, IL. She now resides in Philadelphia and knows where to get the best cheesesteaks.

DOWNLOAD: http://uahu.org/uahu_meeting_unitedhealthcare.pdf

Mary Flynn
Vice President, Dental Market Solutions
UnitedHealthcare

Ms. Flynn has more than 20 years of experience in the health care industry specializing in dental and most recently focused on business growth across all segments of the commercial group dental business. She brings a broad background of product development and strategic planning for employee benefits coupled with prior clinical experience creating a well-balanced understanding of dentals impact across all key health care stakeholder groups.

Ms. Flynn is responsible for aspects of UnitedHealthcare's national product portfolio inclusive of our integrated dental programs with medical represented in the market under our Bridge2Health banner. In addition to her current role as Vice President, Market Solutions, for UnitedHealthcare, she previously held a business development role for Dental Network of America, a division of Health Care Services Corporation working with several health insurance and health care delivery organizations. Ms. Flynn studies were done at Pace University in New York as well as the Dental Studies Institute in New Jersey.

March 2017

John Mauer

INSTRUCTOR BIO

- Grew up on a dairy farm in Wisconsin
- Worked continuously in the insurance industry since 1981
- Former corporate instructor for American Family Insurance
- Other job experience in the insurance industry: software development, data analytics, sales, and claims adjusting
- Co-Owner of Mountain CE, LLC
- Has a passion for helping people pass the Utah insurance exam!

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Mountain CE, LLC

- Since 2005, we have provided education to Utah insurance producers
- Utah family business, owned by Marlene and John Mauer
- Our focus is Property, Casualty, Life, and Health insurance
- More than 1,000 Utah insurance producers take our continuing education (CE) classes each year
- Each year we help hundreds of Utah residents successfully pass the Utah insurance exam
- The passing rate for students who follow our program from start to finish is very high

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