

AGENDA

Day 1

6:00 – 7:00pm

7:00 – 9:00pm

Day 2

7:00 – 8:15am

8:15 – 9:00am

9:00 – 9:45am

9:45 – 10:00am

10:00 – 10:45am

10:45 – 11:00am

11:00 – 11:30am

FQHC EDUCATIONAL BRIEFING

Wednesday – October 30, 2019 (all times are in Mountain Standard time)

Arrival at The Royal Palms Resort – Check in is 4pm

Welcome Reception

Provided at the Reflecting Pool

DINNER

Provided at Estrella East

Thursday – October 31, 2019

BREAKFAST

Provided at the Reflecting Pool

Jim & Jamie Hebets, President & Sr. Vice President, NFP – The Hebets Company

Introduction for all attendees – meeting is in the Estrella Salon

Colleen Curtis, President & CEO of United Health Centers, Fresno, CA

How she led her FQHC from near bankruptcy 11 years ago to the thriving and profitable organization it is today.

- Learn how she has used technology to generate cost efficiencies as well as utilized strategic short and long term planning to grow from a \$2 million deficit with 200 employees 11 years ago to 800 employees today.
- On track to open 8 new locations this year and 10 more in the following year while maintaining 10% plus profit margins year over year.

Jim Hebets, President, NFP – The Hebets Company

Compensation Benchmarking – How to utilize this tool to validate “Market Comp” for the Executive Leadership Team

Melinda K. Figeley, SPHR, Vice President, HR Solutions, NFP

Compensation Strategies – Total Rewards Systems in a Seller’s Labor Market

- Talent Landscape today is characterized by high demand and low supply
- Competitive cash compensation is a start – but it’s not enough to attract top-flight talent
- Employers must have a compelling total reward offering to acquire, motivate and retain their key people

BREAK

Kameron Jones & Allison Kaylor-Flink – National SVP’s NFP Retirement Services

The journey through the qualified plan landscape so that all of your employees can retire with dignity.

- Learn how to cleverly create / design a 403(b) or 401(k) to get maximum contribution allowances for provider and executive leadership teams.
- How to make sure you are protecting your C-Suite and Board of Directors from a fiduciary standpoint.

Day 2 (cont.)

Thursday – October 31, 2019

11:30 – Noon

Jeremiah Krahulik, CSFS, Vice President, NFP Corporate Benefits Division

NFP Health & Welfare Benefits - Cutting Edge Employee Benefits Strategies

- Learn about and explore alternative funding options
- How to create savings through the removal of Carrier Profit & Premium Taxes
- How to improve plan design flexibility through alternative funding options
- Learn how to go through a proper competitive bidding process

Noon – 1:00pm

LUNCH

Provided at the Reflecting Pool

1:00 – 1:15pm

Special Announcement from Jim & Jamie Hebets

1:15 – 1:45pm

Kiki Nocella, Director of Graduate Medical Education, Wipfli, LLP

The How-To of Integrating Medical Education Programs into FQHC's from 25 years of experience having served over 100 FQHCs

- Attracting and Retaining Clinical Workforce within FQHCs
 - o Why “Grow Your Own”?
 - o What specialties are possible?
 - o What does it require?
 - o Is this for you?

1:45 – 2:00pm

Jamie Hebets, Sr. Vice President, The Hebets Company, NFP

30,000-foot view of all creative alternative retirement benefits such as 162 Bonus, 457(b), 457(f), Loan Regime Split Dollar

- What are actual “in-market” company retirement contribution formulas being used all across America today

2:00 – 2:45pm

Jamie Hebets, Sr. Vice President, The Hebets Company, NFP

162 Bonus, 457(b) Deep Dive with actual case studies

- Learn how leading FQHCs are utilizing these strategies to dramatically enhance retirement benefits for their executive leadership team and provider groups
- 162 Bonus Plans, a retirement benefit arrangement that can help address short term and long-term financial savings needs for its participants

2:45 – 3:00pm

BREAK

3:00 – 3:45pm

Jim Hebets, President, The Hebets Company, NFP

Loan Regime Split Dollar VS 457(f) (SERP) Plans

- Learn how to have a retirement benefit sit on the books of your organization as an interest accruing asset rather than an expense or liability
- How to efficiently “Catch-Up” your leadership for missed retirement contributions with a fully cost recovered tax-free retirement benefit

Day 2 (cont.)

Thursday – October 31, 2019

3:45 – 4:15pm

Rich Sirus, Shareholder, Greenburg Traurig, LLP

Leading National Executive Compensation Attorney shares the legal side of how to implement all of these strategies

- Overview of all documents needed to implement a 162 Bonus Plan, 457(b) Plan, 457(f) Plan & Loan Regime Split Dollar
- Key document design features to provide great benefits while still providing necessary corporate protections

4:15 – 4:45pm

Jamie Hebets, Sr. Vice President, The Hebets Company, NFP

The steps involved in actually implementing a plan from start to finish

4:45 – 5:30pm

Q & A / Breakout Sessions

6:15pm

Transportation to DINNER

Meet at 6:15pm at the Pillow Benches at The Royal Palms Resort

6:30pm

COCKTAILS and DINNER

Tomaso's Restaurant - 3225 East Camelback Road, Phoenix, AZ

Day 3

Friday – November 1, 2019 Offices of The Hebets Company

OPTIONAL

ONE-ON-ONE STRATEGY MEETINGS WITH THE HEBETS COMPANY

Schedule a one-on-one strategy session with Jim, Jamie, Richard and Eamon. Refreshments will be provided.

Please reach out to Sharon Parrish at SharonP@HebetsCo.com or on her cell phone (602) 312-9658 to schedule a one-on-one session or event logistical questions.