

## AGENDA

### Day 1

6:00 – 7:00pm

7:00 – 9:00pm

### Day 2

7:00 – 8:30am

8:30 – 9:30am  
*Live Stream*

9:30 – 10:15am  
*Live Stream*

10:15 – 10:30am

10:30 – 11:00am  
*Live Stream*

11:00 – 11:30am  
*Live Stream*

## FQHC EDUCATIONAL SYMPOSIUM

Wednesday – November 17, 2021 (all times are in MST)

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

### Welcome Reception

Provided at the Reflecting Pool

### DINNER

Provided at Estrella East

Thursday – November 18, 2021

### 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*

### Joseph Moscola, PA, MBA, EVP Enterprise Management, Northwell Health

*CEO Succession Planning – How Northwell Health Has Positioned Themselves as a Destination Employer to Manage the Imminent Transition of their CEO*

- Top 5 obstacles Northwell Health has faced and addressed in their CEO Succession Plan
- How to sculpt your desired culture and create stickiness around that culture
- Strategies to attract and retain your key people at all levels
- How investing in the culture, the organization, the retention of key people and thinking long term is critical.
- How Northwell transformed their Executive Retirement Benefits to retain their key people.

### BREAK

### Melinda K. Figeley, SPHR, Principal, NFP - The Hebets Company

*Attracting and Retaining Top Talent – Your Competitive Edge*

- The current employment situation
- Opportunity is knocking
- Why Compensation & Total Rewards Benchmarking is *Critical*
- The Complimentary CEO Total Rewards Snapshot

### Kameron Jones – Assistant Vice President – NFP Retirement

*Changing the Paradigm of Benefits Design and Engagement – The Convergence of Health and Wealth*

- Understand the challenges employee's face to create positive financial outcomes and why that matters to employers
- Create a framework to have all benefits working together to create better financial outcomes and enhance employee retention:
  - o Engage Employees on all the benefits (not in silos)
  - o Design your benefits for employee needs
  - o Make employee's dollars go further through investing in the appropriate benefits for their specific situation
- Learn how to cleverly create / design a 403(b) or 401(k) to get maximum contribution allowances for provider and executive leadership teams.

**Day 2 (cont.)**

**Thursday – November 18, 2021**

**11:30 – Noon**  
**Live Stream**

**Jordan Cook, Vice President, NFP Corporate Benefits Division**

*Health & Welfare Benefits – Balancing Cost Containment and Plan Design*

- Learn about emerging trends in high-cost claims
- The significance of benchmarking
- Self-insured & alternative funding best practices
- How to go through a proper due diligence process

**Noon – 1:00pm**

**LUNCH**

Provided at the Reflecting Pool

**1:00 – 2:00pm**  
**Live Stream**

**Jamie Hebets, Senior Vice President, NFP – The Hebets Company**

*A. Non-Profit Executive Benefits 101 – Crash Course on All Available Plan Types, Designs & What is Considered “In Market”*

- What types of benefits are traditionally provided at the C-Suite level?
- What would be deemed “in-market” from an employer contribution standpoint?
- Learn how leading organizations are utilizing these strategies to dramatically enhance their ability to attract, reward & retain their key employees.

*B. Cost Recovery w/Interest – A Transformative Paradigm Shift*

- How leading organizations no longer have to view employer contributions to executive benefits as an expense or liability, but instead see them as a long term, interest accruing asset.
- How to design your executive retirement benefits in such a fashion where 100% of every dollar contributed can be recovered, later, with interest.

*C. Executive Retirement Benefit Case Studies – Where the Rubber Meets the Road*

- Deep Dive into actual before & after stories of Hebets Co clients.
  - o CEO Retirement / Succession Planning, C-Suite Retention, Provider Retention

**2:00 – 2:30pm**  
**Live Stream**

**Rich Sirus, Shareholder, Greenburg Traurig, LLP**

*Employee Benefit Plan Development – Establishment Requirements and Best Practices*

- Common and recent employee benefit plan offerings
- Plan development considerations and best practices
- Plan document & disclosure requirements
- Plan operation requirements and best practices

**Day 2 (cont.)**

**Thursday – November 18, 2021**

**2:30 – 3:30pm**  
**Live Stream**

**Jim Hebets, President, The Hebets Company, NFP**

*CEO Retirement & Succession Planning – 457(f)/SERP vs Loan Regime Split Dollar*

- 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
- How your organization can recover 100% of every dollar funded to provide this retirement benefit, with interest.

**3:30 – 4:00pm**

**BREAK**

**4:00 – 4:45pm**  
**Live Stream**

**Andrew DeVoe, EVP & CFO, TriHealth**

*Transformational Executive Retirement Benefits – TriHealth Shares Their Approach*

- Competitive Landscape for Senior Leadership
- Why TriHealth revamped their already competitive plan
- Full details on Loan Regime Split Dollar
- The Transformation Roadmap

**4:45 – 5:30pm**

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

*Q&A / Breakout Sessions*

**5:30 – 5:45**

**Cocktails & Refreshments**

**6:15pm**

**Transportation to DINNER**

*Depart 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 19, 2021**

**7:00 – 8:30am**

**BREAKFAST**

Provided at the Reflecting Pool

**8:30 – 8:45am**  
**Live Stream**

**Jim & Jamie Hebets, President & Sr. Vice President, NFP – The Hebets Company**  
*Introduction for all attendees – meeting is in the Estrella Salon*

**8:45 – 9:30am**  
**Live Stream**

**Pedro Cons & Sentari Minor, CEO & Board Chair – Adelante Healthcare**  
*Organizational Transformation as a New CEO – The First 90 Days & Beyond*

- Learn more about how Pedro Cons, the new CEO of Adelante Healthcare has already begun the process transforming this wonderful organization into not only the largest FQHC in Arizona, but also one of the best places to work as well.
- Pedro Cons & Board Chair, Sentari Minor, will share with you the strategies that they have utilized over the last year and a half with Pedro as the new CEO to dramatically improve culture, grow revenue by over 20% and develop incredible retention and low turnover.

**Jim & Jamie Hebets, President & Sr. Vice President, NFP – The Hebets Company**  
*Breakout Session Introduction*

**9:30 – 10:00am**

**Breakout Session**

**10:00 – 10:30am**

**Breakout Session**

**10:30 – 11:00am**

**Break: Artesian Deli Buffet**

**11:00 – 11:30am**

**Breakout Session**

**11:30 – Noon**

**Breakout Session**

**Noon**

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

**ONE-ON-ONE (complimentary) STRATEGY MEETINGS WITH THE HEBETS COMPANY**

*Schedule a one-on-one strategy session with Jim, Jamie, Melinda, Richard, Kameron, Jordan  
Refreshments will be provided.*

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