

12/3/2025 - 12/5/2025

Event Venue:

The Royal Palms Resort  
5200 East Camelback Rd  
Phoenix AZ, 85018

# Educational Symposium

for FQHC CEOs & executive leadership teams



## Cutting Edge Trends in Executive Compensation: How to Attract & Retain Top Talent

Conference will be held in the Estrella East Room. Livestream available during conference.

### AGENDA

Day 1: Wednesday, December 3, 2025

*Arrival at The Royal Palms Resort - Hotel Check Begins at 4pm*

6:00pm - 7:00pm **Welcome Reception**  
*Location: Palmera Patio*

7:00pm - 9:00pm **Dinner**  
*Location: Palmera Salon*

Day 2: Thursday, December 4, 2025

7:00am - 8:15am **Breakfast**  
*Location: Palmera Salon*

8:30am - 9:15am **Introduction of Attendees**  
Moderated by Jim Hebets, Chief Executive Officer - *The Hebets Company*

9:15am - 10:00am **How to Become a 5-Star Community Health Center of Choice & Grow Revenue & Retention Through an Empowered Front Line**  
Brian Lee - Founder and Chief Executive Officer - *Custom Learning Systems*

10:00am - 10:30am **Best Practices for Enhanced Healthcare Delivery**  
Margarita Ollet, RN, BSN, MBA  
- Chief Executive Officer - *Health Choice Care* & Chief Operating Officer - *Health Choice Network Inc*

10:30am - 10:45am **Break**  
*Location: Estrella Patio*

10:45am - 11:30am **Planning for Future Success of the Organization**  
Melinda Figeley, Principal - *The Hebets Company*

11:30am - 12:00pm **NACHC Centers of Excellence and the Power of NACHC Cares**  
Sean Roddy, CPA, CMA, CGMA, MBA, Chief Growth and Financial Officer - *National Association of Community Health Centers*

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Day 2: Thursday, December 4, 2025 (continued)

12:00pm - 1:00pm

**Lunch**  
*Location: Palmera Salon*

1:00pm - 1:15pm

**Introduction of Staff**  
Jim Hebets and Jamie Hebets - *The Hebets Company*

1:15pm - 2:00pm

**Non-Profit Supplemental Benefits 101: Crash Course on All Available Plan Types, Actual Designs with Case Studies & What is Considered "In Market"**  
Jamie Hebets, President - *The Hebets Company*

- **CEO Retirement & Succession:** Bridging the retirement income gap for a CEO to allow for a thoughtfully planned and smooth transition to occur.
- **C-Suite & Provider Retention:** Programs permitted by the IRS to supplement retirement that foster an environment of long-term commitment and loyalty between employers and key employees of their choosing.
- **What's "In-Market":** The "time-tested" classic approach to calculating a fair and reasonable retirement benefit for your C-Suite and/or Providers.
- **Cost Recovery with Interest:** Strategies to recoup 100% of employer retirement contributions, along with accrued interest, at a later date.
- **The "Tax-Free" LTIP or Stay Bonus:** Long term incentive or stay bonus plans that can be provided tax-free, and also supplement one's retirement if so desired.

2:00pm - 2:45pm

**Insights on Emerging Regulations Impacting FQHCs**  
Leith States, MD, MPH, MBA, FACPM, Veteran, Executive Leader - *Former Acting Assistant Secretary for Health*

2:45pm - 3:00pm

**Break**  
*Location: Estrella Patio*

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#### Day 2: Thursday, December 4, 2025

3:00pm - 4:00pm

**CEO Panel - Moderated by Jim Hebets**

- Justin Preas, President, Chief Executive Officer - *United Health Centers of the San Joaquin Valley*
- Richard Taaffe, Chief Executive Officer - *Hawai'i Island Community Health Centers*
- Tony Weber, Former Chief Executive Officer - *Golden Valley Health Center*
- Paulo Soares, Chief Executive Officer - *Camerena Health Services*

4:00pm - 4:30pm

**Recap of the Day - Q & A**

Jamie Hebets, President - *The Hebets Company*

5:00pm - 5:15pm

**Transportation to Dinner**

Meet at the Pillow Benches at The Royal Palms Resort

6:00pm

**Cocktails and Dinner**

The Italiano- 9301 E Shea Blvd #137, Scottsdale, AZ, 85260

9:00pm

**Transportation back to Hotel**

#### Day 3: Friday, December 5, 2025

7:00am - 8:15am

**Breakfast**

Location: *Palmera Salon*

8:30am - 9:00am

**Where We Stand: National Patient & Pharmacy (340B) Experience  
Benchmarks and How to Move the Needle**

Mark Robledo, Chief Executive Officer - *The Crossroads Group*

9:00am - 9:45am

**Leading Through Change**

Jim Coombs, Chief Executive Officer - *Grand River Hospital*

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Day 3:

Friday, December 5, 2025

9:45am - 10:45am

#### C-Suite and Provider Attraction & Retention Strategies - Migrating your 403(b) contributions into a 162 Bonus Plan.

Jim Hebets, Founder and Chief Executive Officer - *The Hebets Company*

- **After-tax and No-Tax Solutions:** *Planning alternatives to traditional retirement solutions.*
- **Addressing the Financial Anomalies of Life:** *The cutting edge response to all financial anomalies.*
- **Compensation Restructure:** *How you can convert what would have been taxable cash pay into something that can be accessed either during your working years or later in retirement, completely tax-free.*

10:45am - 12:00pm

#### Final Notes & Introduction to Roundtable Sessions

Jamie Hebets, President - *The Hebets Company*

11:00am - 12:30pm

#### Lunch Served During Roundtable Sessions

Location: *Estrella Patio*

12:00pm

**Conclusion of Event** (One-on-one Meetings Available in Afternoon Upon Request - Contact Sharon Parrish for more information)