

## ABOUT THE KEYNOTE SPEAKER

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### **JOHN J. NELSON**

Co-CEO, Warner Pacific

John Nelson is a Chief Executive Officer of Warner Pacific Insurance Services, one of the nation's largest health insurance general agencies serving over 40,000 small employers with over \$1.5 billion of inforce premium.

John has been a member of the National Association of Health Underwriters for more than 18 years. NAHU is an organization with approximately 20,000 health insurance professionals who serve over 100 million Americans. John served in various leadership positions within Health Underwriters including its national president during 2005/2006.

John has been a champion of legislative and educational efforts in the health insurance industry. He has also been an advisor and friend to lawmakers, industry leaders, business groups and consumers and has had a hand in educating thousands of health insurance professionals. In recognition of John's efforts, last year during its 80th Annual Convention in Chicago, NAHU honored John as recipient of the Harold R. Gordon Award, the health insurance industry's most meaningful and significant honor. John has also received numerous leadership and legislative awards over the years including member of the year awards from NAHU's Los Angeles and California chapters.

A UCLA graduate, John was named Chancellors Marshall, president of the Delta Sigma Phi fraternity and a rower for varsity crew. Within his community, John has consistently contributed time and resources to a variety of organizations including youth programs and charities. He is a past recipient of a Paul Harris Rotary Award.

## ABOUT THE PANELISTS

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### **Ron Goldstein**

President and CEO, CHOICE Administrators

Ron Goldstein is the President and CEO of Orange, California based *CHOICE* Administrators, and has been the leading architect in the creation and acceptance of group employee-choice health insurance Exchanges. He currently is responsible for a series of health insurance programs including America's longest-standing, state-approved health insurance Exchange, *CaliforniaChoice*.

In 1990, Goldstein joined Word & Brown as Vice President of agency operations, and annually earned the coveted NAHU Golden Eagle for Management award. In 2003, Goldstein was appointed President of *CHOICE* Administrators, a Word & Brown Company, and appointed CEO in 2011. *CHOICE* Administrators is the nation's leading developer and administrator of health insurance exchanges including *CaliforniaChoice*, *CaliforniaChoice 51+*, Kaiser Permanente Choice Solution, HSA California, Contractor's Choice and Choice Builder, the nation's first dental and ancillary Exchange.



### **RICH HINES**

Director of SHOP Sales - Southern California  
Covered California and Pinnacle Claims Management

Rich has been in the Employee Benefits industry for over 30 years in Sales and Sales Management most recently with Humana and PacifiCare/United Healthcare.

Rich attended San Diego State University and has a BS degree in Management and lives in Tustin Ranch, California.



### **RICK JACOB**

Vice President Business Development, Prospect and ProMed Medical System

Mr. Jacob has approximately 25 of experience in the healthcare field and has held executive management positions with many hospital systems and provider groups.

For the past 4 years, Mr. Jacob has held the post of Vice President of Business Development for Prospect and ProMed Medical System, which oversees close to 200,000 managed care members throughout Southern California. He is currently responsible for network growth and development, management service contracting, acquisition and mergers.



### **DAVID S. KIM, MD**

Facility Medical Director, MemorialCare Medical Group

Board certified in family medicine, Dr. Kim joined MemorialCare Medical Group in 2005. In 2009 he assumed the role of Facility Medical Director at MemorialCare Medical Group, Costa Mesa. Dr. Kim was subsequently appointed Facility Medical Director for MemorialCare Medical Group's new facility in the Los Altos area of Long Beach. In addition to being Medical Director, Dr. Kim was highly involved in the development of that site from designing the layout, work-flows and equipment using the Toyota Lean Process. He is also responsible for ensuring quality patient care and overseeing the patient satisfaction program. He is a member of the board of directors from MemorialCare Medical Group. Dr. Kim has been named a Physician of Excellence by the Orange County Medical Association in 2009, 2010, 2011 and 2012.



### **Kevin Manemann**

Chief Operating Officer, Southern California, St. Joseph Heritage Healthcare

Kevin Manemann is the Chief Operating Officer for St. Joseph Heritage Healthcare (SJHH), Southern California Region, which consists of 1,600 physicians across five medical groups (foundation model) and five IPAs. In this role, Kevin is responsible for managing the operations of a \$400 million dollar organization with approximately 400,000 patients, 200,000 of which are in managed care agreements. His focus is on developing innovative solutions, laying the foundation for easier interoperability and secure data sharing across the continuum of care, enabling physicians and caregivers to make informed decisions at the point of care.



## **JOSEPH D. MARKLAND**

President and Founder, HR Technology Advisors (HRT)

Joe is President and Founder of HR Technology Advisors (HRT). HRT is a leading HR and Benefits Technology consulting and solution provider since 2001. HRT consults benefits brokers and their customers on how to leverage technology to simplify HR and Benefits Administration. HRT has analyzed more than 100 HR and Benefits technology companies and have deployed solutions to over 400 employers utilizing 30 different vendors.

Joe was one of the early entrants into the Benefits Technology business when he founded StarNex, Inc. in 1997. StarNex was an employee benefits technology firm focused on technology solutions that utilize the Internet to quote and enroll group insurance programs. As President he created the BrokersPortal.com website which was utilized by over 10,000 employee benefits brokers. Joe started the current consulting business after the sale of StarNex in 2001.

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## BREAKOUT SESSION SPEAKERS

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**Phil Hood**

Director of Marketing, Rainmakers Advisory, LLC

Phil is currently Director of Marketing with Rainmaker Advisory LLC a 20+ years of marketing and sales experience in the Employee Benefit a retail insurance broker and as a wholesaler of various products, d through the brokerage communit California. His experience runs the g of "street level selling" to managing inside and outside sales representatives. He has worked in small and midsize markets and sold administrative solutions to large groups and carriers nationwide.



**David J. Milligan**

Vice President of Sales, SCAN Health Plan

David Milligan joined SCAN Health Plan in 2011 as the Vice Pre Sales. He joined SCAN in Long Beach, CA to be a part of admisi organization that focuses exclusively on Medicare beneficiaries and one th provides excellent customer service.

David has worked in the Medicare field for over 20 years including PacificCare/Secure Horizons, CareMore and Bravo During his tenure the industry he has worked in a d of areas, including Member Reter Marketing, Compliance and Sales Management.



**Mark Reynolds, RHU**

President, BEN-LECT

Mark Reynolds has played an active role in the marketing and admin employer group health plans in California. From 1984 to 1993 M was the Senior Vice President for Quorum Insurance Administrators Diamond Bar, California. In 1993, Mark facilitated the sale of Quorum t Dunn & Bradstreet Corporation.

Mark's background also includes being a member of the Inland Empire Association of Health Underwriters and Past President of the Association of Independent Administrators.

## BREAK-OUT SESSION SPEAKERS

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### **Angelo P. Terese, CLU**

UnitedHealthcare AARP Medicare Supplement Regional Sales Manager  
(Pacific Coast Region)

Angelo has 40 years of insurance experience (Life Insurance, Annuity, Long Term Care and Medicare Markets) with a major focus in building relationships on behalf of major carriers with National Marketing Organizations. He has also helped recruit and train new and experienced agents.



### **Linda Zimmer**

President and CEO, Marcom:Interactive

Linda's specialty is modernizing your communication with - and your connections to - your customers. She has clocked more than 60,000 hours in building up-to-date strategies and platforms that capture customers and trigger action.

She applies her expertise to digital marketing and business strategies, and has more than 30 years of experience developing and leading marketing programs and teams. Her international clientele include J&J, Nike, Disney, Intel, Port of Los Angeles, Heinz, The Simon Group, U.S. Forestry Service, and the FDA.

Linda founded one of the first online consultancies in 1983 creating reputation and engagement programs using then emerging online networks, the predecessors to our modern-day social media. During her career she has lead and managed large multimedia teams, strategized and lead hundreds of online programs and websites, and mentored executives in "thinking digital."