

# Create Unforgettable Client Experiences



**A** ALERAGROUP

Alera Group 2026 S3 Conference | April 7-9, 2026

## TUESDAY, APRIL 7

- 1:00-2:30** Welcome and Introductions
- 2:30-3:30** Key Cost Drivers & Strategy Shifts – **Kaycee DeGabriele & Shaun Sullivan**
- 3:30-3:45** *Break*
- 3:45-4:30** From Options to Outcomes: A Vision for a Simplified, Data-Led Client Lifecycle – **Brian Uhlig**
- 4:30-5:00** Bussin' Benefits Communications – **Chris Vaughn**
- 5:00-5:30** Key Sponsor Address – **Spring Health**
- 6:30-8:30** *Dinner at Pins Mechanical (856 Carrollton Ave, 2<sup>nd</sup> Floor)*

## WEDNESDAY AM, APRIL 8

- 8:00-9:00** *Breakfast*
- 8:30-9:10** Make Clients Feel Taken Care Of: The Benefits Admin Playbook Advisors Can Actually Use – **Shane Brown**
- 9:10-9:30** From Signals to Solutions: Introducing HR Support That Drives Client Success – **Jessica Wobick**
- 9:30-9:55** Indicators and Opportunities for Direct Contracting – **Allison France & Mary Delaney**
- 9:55-10:10** *Break*
- 10:10-11:00** Direct Contracting Strategies that Win – **Brant Couch & Scott Pruzan**
- 11:00-12:00** Policy Headwinds and Key Compliance Considerations – **Danielle Capilla**
- 12:00-1:30** *Lunch*

# Agenda Cont.

WEDNESDAY PM, APRIL 8

- 1:30-2:00** Employee Benefits and Retirement Due Diligence – **Sara Carroll**
- 2:00-2:20** Financial Stewardship and Risk Oversight in Employee Benefit Plans – **Harindra Sabastian**
- 2:20-3:00** Improving Client Support and Driving Improved Outcomes: Improved Carrier Contracting and Oversight of High-Cost Claimants – **Ashley Berry & John Delaney**
- 3:00-3:15** *Break*
- 3:15-4:00** Leverage Data to Identify the Correct Vendor – **Sophia Fox and Andrea Lausch**
- 4:00-5:00** Sponsor Vendor Presentations
- 5:00-6:00** *Happy Hour (Bottleworks, The Lab)*
- 7:00-9:00** *Dinner at Commission Row (110 S Delaware St, The Pennsylvania Room)*

THURSDAY, APRIL 9

- 8:00-9:00** *Breakfast*
- 8:30-9:30** Shift in the PBM Market – **Guest Speaker – Carrie Mueller**
- 9:30-9:45** *Break*
- 9:45-10:30** Pharmacy Trends, Influencers and Strategies - **Kaycee DeGabriele & Kevin Gregory**
- 10:30-12:00** Alera Best Next Steps – **Group Think Tank**
- 12:00-1:00** *Lunch (on your own)*
- 1:00-3:00** Optional VIST Tool Training

Key Sponsor **Spring Health** 

