

# Alera EB Sales, Service and Strategy

2026

Wifi: Bottleworks Guest (No password)

# Housekeeping Items

- Restrooms are located in both directions of our space:
  - **To the right:** all the way to the end of the hallway, enter through double doors, make a left turn and another left
  - **To the left:** all the way to the photo booth, you will come to a green wall and enter through opening and restrooms will be to the right marked Men's and Women's.
- All of our slide decks can be found and downloaded at <https://vitalincite.com/s3-2026-resources/>
  - There is an additional link to this page in the Agenda section of the S3 website or at the QR code below



“PEOPLE WILL FORGET  
WHAT YOU SAID, PEOPLE

AI Answer:

We help HR and financial leaders feel confident in their strategy- not because costs stop rising, but because decisions are intentional, risk are understood, and trade-offs are clear.

~ Maya Angelou

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leaders feel confident in  
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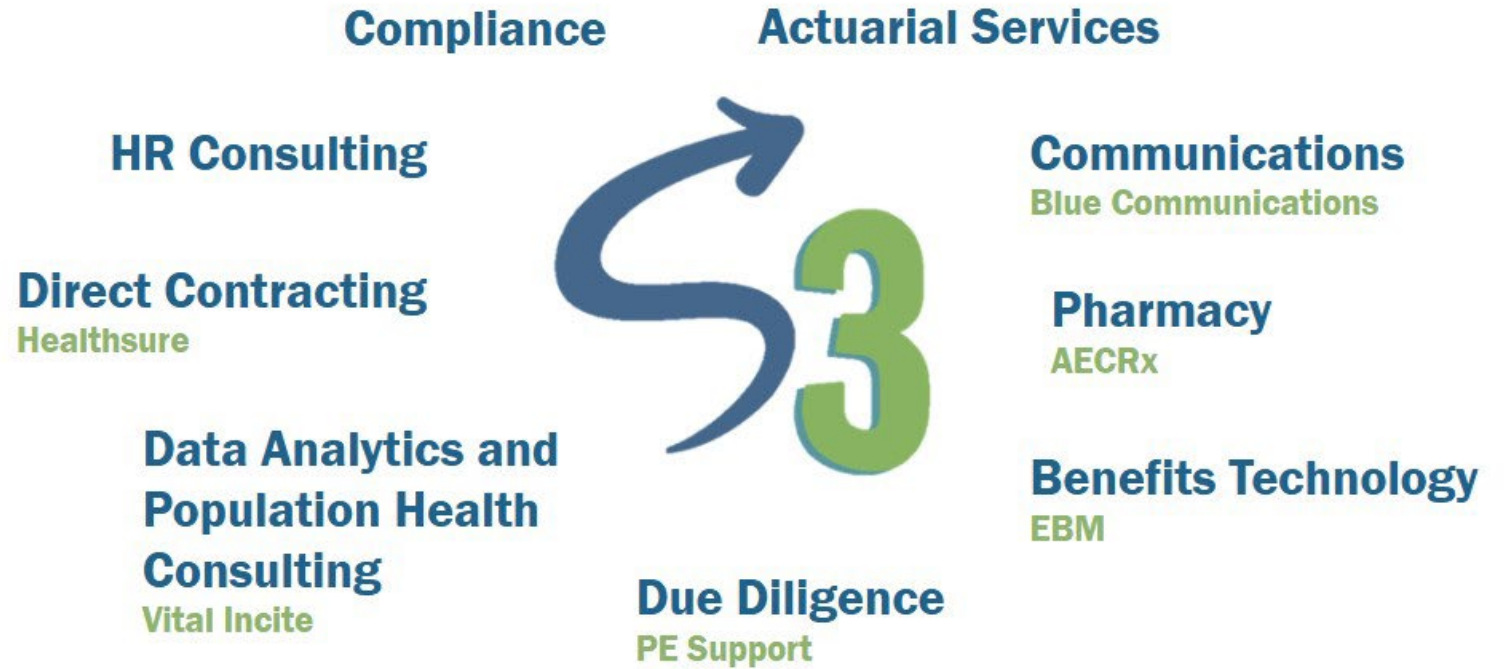
and trade-offs are clear

- **CFO Confidence** Comes with Clarity- not Certainty
- Translate “HR Pain” into Business Signals (**make HR feel seen**)
- Anchor **Strategy to External Reality**
- Show a **Line of Sight** from Decisions to Outcomes
- Position Alera Group as a **Steady Operator**, Not a Fire Alarm responder.

# 2026 Employer Benefits Priorities

- Cost trend + affordability (employer + employee) as the #1 constraint
- Pharmacy strategy (especially GLP-1s and specialty Rx) becoming “board-level” benefits work
- More aggressive vendor accountability (performance, transparency, audits, outcomes)
- Plan design shifts + “non-traditional” plan options to steer to higher-value care
- Navigation / high-performance networks / steerage as a core capability—not an add-on
- Mental/behavioral health: sustained utilization + quality/appropriateness scrutiny
- Women’s health and family supports expanding quickly (preventive, maternity, menopause)
- Data + analytics to measure ROI, manage high-cost claimants, and run smarter programs
- Policy watch: ERISA/tax exclusion priorities and broader federal policy uncertainty

# Alera Collaboration



# Meeting Objectives

- A clearer, more effective approach to delivering memorable, high-impact client support
- A stronger understanding of the biggest challenges employers are facing
  - including strategies that have worked, and those that have fallen short
- Insight into government policy changes that may influence benefits strategy and plan design
- Practical guidance on identifying and implementing advanced strategies, including direct contracting
- A better understanding of what private equity firms expect from employee benefits advisors
- A sharper perspective on when communication can deliver greater ROI
- Stronger peer relationships to support collaboration and drive better outcomes

# Key Sponsor

## Spring Health

Thank you to our  
sponsors!

## Bronze Sponsors



Firm	Primary Emphasis (What they lead with)	Secondary Emphasis (Supporting priorities)	Distinctive Angle (How they differentiate)
<b>Gallagher</b>	Affordability & total cost reduction	Employee payroll impact, wellbeing tied to cost	Strong <b>employee-experience lens</b> on affordability; speaks most directly to HR pain
<b>Lockton</b>	Cost reduction as top decision driver	Simplicity, EVP clarity, workforce alignment	<b>Clarity over complexity</b> ; benefits as part of employer brand and trust
<b>Aon</b>	Medical cost inflation & risk ( $\approx 9.5\%$ )	Chronic conditions, GLP-1s, high-cost claimants	<b>Most actuarial and claims-driven</b> ; forecasting, predictive analytics
<b>Mercer</b>	Cost management vs. affordability tension	Plan design changes, alternative plans	<b>Most explicit about cost-shifting &amp; plan architecture</b> levers
<b>Marsh McLennan Agency (MMA)</b>	Rising medical & pharmacy costs	Specialty Rx, GLP-1s, alternative funding	Bridges <b>broker + consulting</b> ; strong on funding models (level-funded, ICHRA)
<b>WTW (Willis Towers Watson)</b>	Total rewards ROI under cost pressure	Pharmacy, chronic conditions, analytics	Frames benefits as <b>enterprise financial strategy</b> tied to retention

**What do you think  
are the top  
concerns for  
employers for 2026?**

Please select your  
top 5



[Results](#)

# What do others think?

■ Top Priority  
 ■ Major Priority  
 ■ Emerging Priority  
 ■ Not a 2026 Focus

Priority Area	Business Group on Health	PwC	Deloitte	SHRM	U.S. Chamber of Commerce
Overall Health Care Cost Trend	■	■	■	■	■
Employee Affordability (OOP & Payroll Impact)	■	■	■	■	■
Pharmacy Cost Management (GLP-1s, Specialty Rx)	■	■	■	■	■
Mental & Behavioral Health (Access & Appropriateness)	■	■	■	■	■
Vendor Performance & Accountability (PBM, point solutions)	■	■	■	■	■
Plan Design Changes / Alternative Plans	■	■	■	■	■
Navigation & High-Value Care Steerage	■	■	■	■	■
Data, Analytics & ROI Measurement	■	■	■	■	■
Women's Health, Maternity, Family Supports	■	■	■	■	■
Policy & Regulatory Protection (ERISA, Tax Exclusion)	■	■	■	■	■

# Day 1

1:00-2:30pm

## **Welcome and Introductions**

2:30-3:30pm

## **Key Cost Drivers & Strategy Shifts**

- Kaycee DeGabriele and Shaun Sullivan

3:30-3:45pm

## **Break**

3:45-4:30pm

## **From Options to Outcomes: A Vision for a Simplified, Data-Led Client Lifecycle**

- Brian Uhlig

4:30-5:00pm

## **Bussin Benefits Communications**

- Chris Vaughn

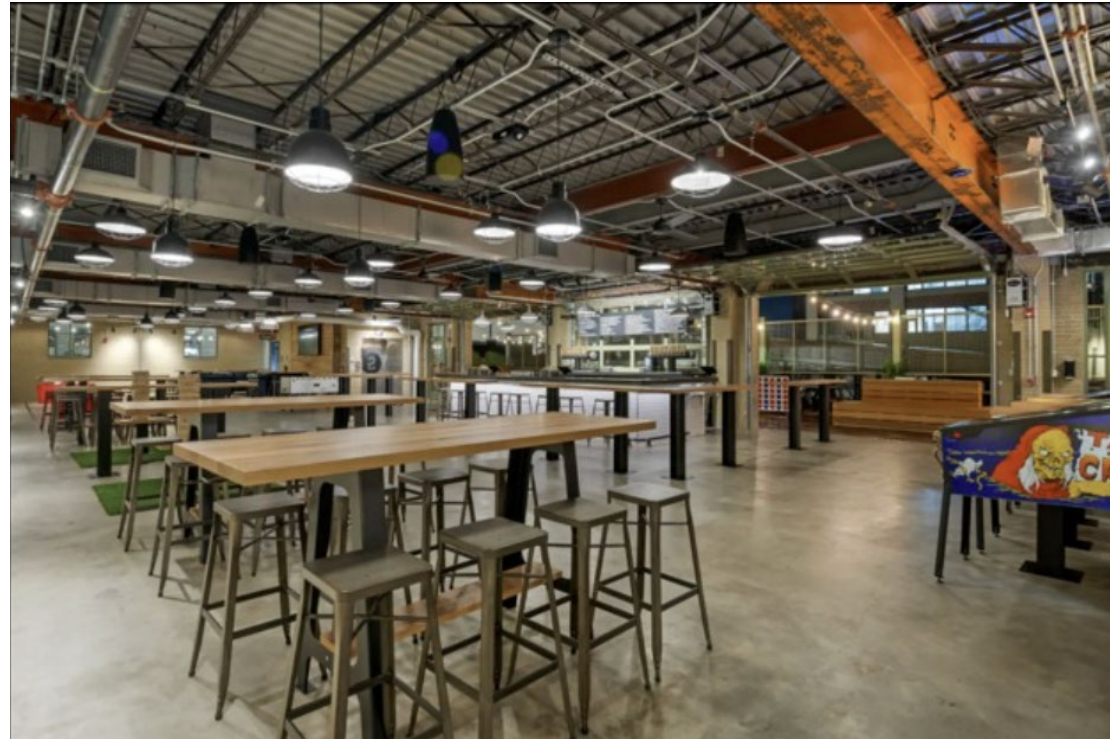
5:00-5:30pm

## **Key Sponsor Address- Spring Health**

- Steen Jorgensen

# Dinner at 6:30

- Pins Mechanical Co.
- Games
  - Patio Pong
  - Hookie, Giant Jenga
  - Giant Connect 4



**We will be on the second floor. Pins Mechanical is located across the street from the Bottleworks hotel**

# Day 2

8:00-9:00am

## **Breakfast**

8:30-9:10am

## **Make Clients Feel Taken Care Of: The Benefits Admin Playbook Advisors Can Actually Use**

- Shane Brown

9:10-9:30am

## **From Signals to Solutions: Introducing HR Support That Drives Client Success**

- Jessica Wobick

9:30-9:55 am

## **Indicators and Opportunities for Direct Contracting**

- Allison France and Mary Delaney

9:55-10:10am

## **Break**

10:10-11:00am

## **Direct Contracting Strategies That Win**

- Brant Couch and Scott Pruzan

11:00a-12:00pm

## **Policy Headwinds and Key Compliance Considerations - Danielle Capilla**

- Danielle Capilla

# Lunch

- 12:00- 1:30



# Day 2

1:30-2:00pm

## **Employee Benefits and Retirement Due Diligence**

- Sara Carroll

2:00-2:20pm

## **Financial Stewardship and Risk Oversight in Employee Benefit Plans**

- Harindra Sebastian

2:20-3:00pm

## **Improving Client Support and Driving Improved Outcomes: Improved Carrier Contracting and Oversight of High-Cost Claimants**

- Ashley Berry and John Delaney

3:00-3:15pm

## **Break**

3:15-4:00pm

## **Leverage Data to Identify the Correct Vendor**

- Sophia Fox and Andrea Lausch

# Strategic Partnership Time

4:00-6:00pm



5-10 minute overview of each of their products



Happy Hour with our sponsors in The Lab

# Dinner– Commission Row



- **Address: 110 S Delaware St Indianapolis, IN 46204**
  - **Pennsylvania Room**

Commission Row is located just south of the Bottleworks District — typically a quick 5-minute drive or about a 20–25 minute walk through downtown Indianapolis.

- Commission Row is a dining and entertainment destination located in Bicentennial Unity Plaza, just steps from Gainbridge Fieldhouse.

# Day 3

8:00-9:00am

**Breakfast**

8:30-9:30am

**Shift in the PBM Market**

- Carrie Mueller

9:30-9:45am

**Break**

9:45-10:30am

**Pharmacy Trends, Influencers and Strategies**

- Kaycee DeGabriele and Jennifer Perlitch

10:30am-12:00pm

**Alera Best Next Steps- Group Think Tank**

12:00-1:00pm

**Depart or Lunch on your own**

1:00-3:00pm

**Optional Vital Incite Strategy Tool Training**

# Let's Introduce Ourselves!



Right now, I am most focused on...

 **ALERA**GROUP

