

The logo for the IMA Innovation Insights Summit. It features the letters 'IMA' in a large, bold, black sans-serif font. To the right of 'IMA' is a black rectangular box containing the words 'INNOVATION' and 'INSIGHTS' in white, stacked vertically. Below 'IMA' is the word 'SUMMIT' in a large, bold, black sans-serif font.

# IMA INNOVATION INSIGHTS SUMMIT

THE EMERGENCE OF A

*Redefined*

WORKFORCE

The letters 'EB' in a large, outlined, sans-serif font. The 'E' and 'B' are connected. The letters are white with a thin black outline.

# EB

A purple circular badge containing the year '2022' in white. The '20' is on the top line and the '22' is on the bottom line.

20  
22

MAY 11, 2022

# AGENDA

## MORNING AGENDA

<b>8:00-8:30</b>	<b>Registration Open &amp; Vendor Marketplace</b>		
<b>8:30-9:30</b>	<b>UNITED CLUB WEST</b> <b>Breakfast/Opening Remarks</b> <b>AM Keynote:</b> Mary Beth Ferrante, Founder WRK/360   "Benefits Can't Fix a Broken Culture"		
<b>9:30-9:45</b>	Transition and Vendor Marketplace		
<b>9:45-10:45</b>	BREAKOUT SESSIONS (45 minute presentation, 15 minute Q&A)		
	<b>UNITED CLUB WEST</b> <b>Changing the Narrative about Older Workers &amp; Work</b> Janine Vanderburg, Director at Encore Roadmap	<b>CHAMPIONS CLUB EAST</b> <b>The Great Resignation - HR Communication Strategies that Drive Workplace Appreciation &amp; Retention</b> Wayne Wall, Founder & CEO Flimp Communications	<b>CHAMPIONS CLUB WEST</b> <b>Is it Possible to Thrive Instead of Just Survive Change?</b> Jacque Roth and Barbara Doering, Certified Change Management Coaches and Employee Benefit Leaders
<b>10:45-11:00</b>	Transition and Vendor Marketplace		
<b>11:00-12:00</b>	BREAKOUT SESSIONS (45 minute presentation, 15 minute Q&A)		
	<b>UNITED CLUB WEST</b> <b>Energy Intelligence &amp; the New Way to Work</b> Kate Neligan, Executive Coach, Equine + Conscious Rockstar Coaching	<b>CHAMPIONS CLUB WEST</b> <b>Redesigning HR for a Transparent, Equitable &amp; Diverse Workplace</b> Jacob Little, Sr. Director of People Experience at Glassdoor	

*Continued...*

## AFTERNOON AGENDA

<b>12:00</b>	<b>Lunch Served</b>		
<b>12:15-1:30</b>	<b>UNITED CLUB WEST</b> <b>Lunch/Presentation</b> <b>Lunch Keynote:</b> Dr. McLaughlin, Medical Director Cigna   "Transitioning at Cigna"		
<b>1:30-1:45</b>	Transition and Vendor Marketplace		
<b>1:45-2:15</b>	BREAKOUT SESSIONS (30 minute presentation, 15 minute Q&A)		
	<b>UNITED CLUB WEST</b> <b>Dream Coach</b> Brad Jeffress	<b>CHAMPIONS CLUB EAST</b> <b>The Greatest Danger in Times of Change is not the Turbulence - it is to Act with Yesterday's Logic</b> Sierra Blankenburg, HR Director The Buckner Company	<b>CHAMPIONS CLUB WEST</b> <b>Importance of Supporting Employees through Financial Education</b> Samantha Jenkins, Wealth Management & Retirement Plan Specialist
<b>2:15-2:30</b>	Transition and Vendor Marketplace		
<b>2:30-3:30</b>	<b>UNITED CLUB WEST</b> <b>Finale Keynote:</b> Jeff Wozer   "Seize the Day Over Seizing our Phones"		
<b>3:30-3:40</b>	<b>Raffle and Closing Remarks</b>		
<b>3:40</b>	<b>Empower Field Stadium Tours for Attendees (if desired)</b>		

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# SPEAKER BIOS



## MARY BETH FERRANTE

**Founder and Managing Partner, WRK/360**

Mary Beth is a mom of two and an advocate for creating inclusive workplaces for parents. She is the Founder & Managing Partner of WRK/360, a platform designed to create workplace cultures that care through scalable leadership development programs that promote care, flexibility, empathetic leadership, and breaking down parental bias. As a former SVP in the finance industry, she always valued growing her career, and like so many other career-driven mamas, she was surprised to hit the Maternal Wall. Her own experience propelled her to dive deeper into maternal and caregiver bias, influence changes in workplace culture, and advocate for a national paid leave policy. Today she blends her corporate strategy and change management background with her experience in professional coaching and leadership development. She is an ICF Professional Certified Coach and Certified Fair Play Facilitator. Her work has been featured in Forbes, Today, CNBC, MSNBC, Working Mother, Motherly, and more.



## DR. RENEE MCLAUGHLIN

**Medical Director, Cigna**

Dr. Renee McLaughlin is National Medical Executive, Value-Based Relationships at Cigna. She leads a team of clinicians who develop, implement and manage Cigna's fee-for-value strategy in both primary care (ACO models) and specialty care. Having undergone gender transition in 2013 while in her current role at Cigna, Dr. McLaughlin is passionate about building diverse and inclusive workplaces and serving diverse customer segments. She serves in a leadership role in Cigna's LGBT diversity organization and supports Cigna's clients on transgender issues. Currently she is on the board of directors for Reaching Out, served on the board for Human Rights Campaign, was a member of the HRC Business Advisory Council, and is a current member of World Professional Association for transgender Health (WPATH), Gay and Lesbian Medical Association, and Out and Equal Transgender Advisory Committee.





## JEFF WOZER

Having toured nationally for 20-plus years on the comedy club and corporate circuit, performing with the likes of Martin Short, Jim Gaffigan and John Oliver, Jeff Wozer now pulls back the curtain on digital distraction, helping people, at both work and home, make better decisions with their screen-use time.

Through keynotes and breakout sessions his engaging blend of insight and humor educates individuals on digital-balance practices so that they, not their devices, are controlling their attentions and, ultimately, their days.

Jeff's insights, borne from his own screen-struggle story, has inspired audiences at conferences and business meetings across the continent. Some of his clients include the Alaska Recreation and Park Association, Premera Health, BASF, the New York State Correction and Youth Services Association, Novelis Aluminum, the Colorado Mortgage Lenders Association and the Contra Costa County Employer Advisory Council, to name a few.



## JACOB LITTLE

**Senior Director of People Experience and DEI, Glassdoor**

Jacob is the Sr. Director of People Experience and DEI at Glassdoor, and the former VP of San Francisco Pride. Jacob grew up all over the world, and brings a passion for culture, history, and creativity into his work. Jacob has spent his entire career in Learning and Organizational Development roles across various industries, however he derives the most passion from infusing DEI into company culture, policies and procedures, and doing the hard work of enacting structural and cultural transformation. As the head of Walmart Pride, Jacob helped the company achieve a 100 rating on HRC's Corporate Equality Index. He started the LGBTQ+ ERG at Levi's, and serves as the head of DEI, in addition to the People Experience team at Glassdoor. As an HR leader at an HR tech company, Jacob enjoys being on the cutting edge of a practice that is changing rapidly, and becoming increasingly crucial to organizational success.



## JANINE VANDERBURG

**Director, Encore Roadmap**

Janine leads Changing the Narrative, the nation's leading effort to change the way people think, talk and act about aging and ageism through evidence-based strategies and innovative public campaigns. She founded its Age-friendly Workplace Initiative, which just won a Metro Vision Award from Denver Regional Council of Governments, to call attention to the business case for older workers and intergenerational teams. Janine chairs the Encore Network, a global coalition of leaders who champion the civic, social, and economic contributions of people 50+, and is an Encore Public Voices Fellow. She also serves on the board of the CWI Labs, which advances bold and innovative solutions to labor force challenges. Currently a resident of Colorado's North Fork Valley, she is a former member of the Denver Commission on Aging, and won the Mayor's Diversity and Inclusion Award for her advocacy of older adults.



## KATE NELIGAN

**Executive Coach, Equine + Conscious Rockstar Coaching**

Kate is an equine-partnered leadership coach whose life's work is devoted to the human-animal bond. Kate pairs her intuitive gifts with those of horses (and goats too!) to help people access greater clarity, confidence, and connection with their life purpose. She has a Master's in Spiritual Psychology and is the creator of Awakening With Equines, a first-if-its kind certification program for equine-partnered facilitators. Kate is also a five-time best-selling author, Huffington Post writer, and motivational speaker including TEDx. Previously, Kate worked in media and entertainment for over 12 years and was a Marketing VP for Lionsgate and worked in event planning, publicity, and marketing for American Film Institute.

While based near Boulder Colorado, Kate coaches both virtually and around the country. She facilitates powerful transformation by helping high-performing executives navigate life transitions with more ease, presence, and flow. She also supports companies in developing mindful cultures and communication skills through team celebrations and leadership workshops. When she isn't working with clients on a private ranch in Longmont, she can be found riding or meditating with her farm animals.



## SIERRA BLANKENBURG

**Human Resources Director, The Buckner Company**

Sierra started with Buckner in 2015 as the Human Resources Director. She oversees the “people” side of the company, including Benefit Administration, Legal Compliance, Employee Relations, Payroll, Recruiting/Onboarding and the Wellness Program. Prior to joining Buckner, Sierra spent nearly three years managing the HR Department for Oakwood Homes.

Sierra graduated from the University of Central Oklahoma with a Bachelor’s degree in Human Resources. She earned her Group Benefit Associate designation in 2017 and is a Society of Human Resources Senior Certified Professional (SHRM-SCP). Sierra enjoys the outdoors and loves spending time with her family. After moving 15 times while growing up, she now calls Colorado home.



## WAYNE WALL

**CEO, Flimp Communications**

An experienced entrepreneur, Wayne has spent his career starting and building global technology companies that solve challenging problems for businesses and people. A University of Virginia alum, Wayne has led Flimp Communications since its inception in 2011, developing innovative digital communication and decision support solutions for HR and benefits teams that help improve employee engagement, education, and benefits decision making. Before Flimp, he established global markets for two successful environmental biotech companies, one of which went public on the London Stock Exchange.





## SAMANTHA JENKINS

**Senior Vice President, Wealth Management & Retirement Plan Specialist**

Samantha Jenkins is Senior Vice President, Wealth Management and Retirement Plan Specialist for IMA Wealth, Inc. in Denver. Samantha is passionate about helping employers design retirement programs that create better outcomes for their employees and is experienced with advising on a variety of retirement programs such as 401(k)s, 403(b)s, and defined benefit Cash Balance plans. In addition, Samantha consults with employers to implement executive benefit programs designed to attract and retain key talent, and also creates financial plans for individuals and families. She focuses on customizing multi-generational asset protection plus incorporating insurance planning, estate planning, financial planning, and investment management.

Prior to joining IMA Wealth, Inc., Samantha served as a 401(k) and Stock Option Plan Manager with Merrill Lynch and became a Certified Financial Planner (CFP®) in 2005 with AXA Advisors. She holds a Bachelor of Science degree in Finance and Economics from the University of Colorado at Boulder. She also earned the Accredited Investment Fiduciary (AIF®) designation through Fi360 in 2019 and is certified as a Chartered Life Underwriter (CLU®) by The American College since 2008. Samantha holds the FINRA Series 7 and the State registration 66. Samantha holds the following lines of authority in the state of Colorado: Accident & Health, Life, Variable Life and Annuity Products.



## JACQUELINE ROTH

**Director of Employee Benefits**

Jacqueline Roth oversees Bolton's Employee Benefits division. She works closely with Bolton's Employee Benefits brokers and service teams to ensure service consistency and develop insurance solutions for emerging industry challenges. With close to a decade of experience as an Employee Benefits Broker with Bolton, Jacqueline leads with a client-first focus in evolving Bolton's Employee Benefits service strategy and approach.

Jacqueline is active within the insurance industry and currently serves on a district board for Professionals in Human Resources Association and is involved with the Society of Human Resources Management. Jacqueline holds a Bachelor of Arts degree in Communication from Azusa Pacific University, and regularly fundraises for APU's East Africa Scholarship Fund.



## BRAD JEFFRESS

### **Dream Coach**

Brad graduated from the University of Iowa in 1979, and started his working career as a claims adjuster with St. Paul Insurance. A few years later he joined the brokerage side of things and was with a few small agencies before landing at IMA in 1990. Brad was a P&C and Benefits producer up until six years ago. At that time, a few life events led him to start a new career and create a new position within IMA, as the Dream Coach. Brad's why is to encourage others so that they see their contribution, potential and purpose in life.



## BARBARA DOERNING

### **California Market Director of Learning & Development**

As the California Market Director of Learning & Development, Barbara leads in the planning and implementation of internal advancements that support Bolton's underlying goals and objectives. The leader and founder of Bolton's internal Strategic People Team, Barbara is focused on the strategic development of our employees, preparing them for future roles and leadership opportunities.

With more than 25 years of commercial insurance and management experience, Barbara holds professional designations of Certified Insurance Counselor (CIC) and Associate in Risk Management (ARM). Additionally, she holds mentorship and coaching certifications in the Process Communication Model, a behavioral communication method developed by Dr. Taibi Kahler. She is also member of the American Society of Safety Engineers, National Notary Association, California Workers' Compensation Coalition Association, and University Risk Management and Insurance Association.



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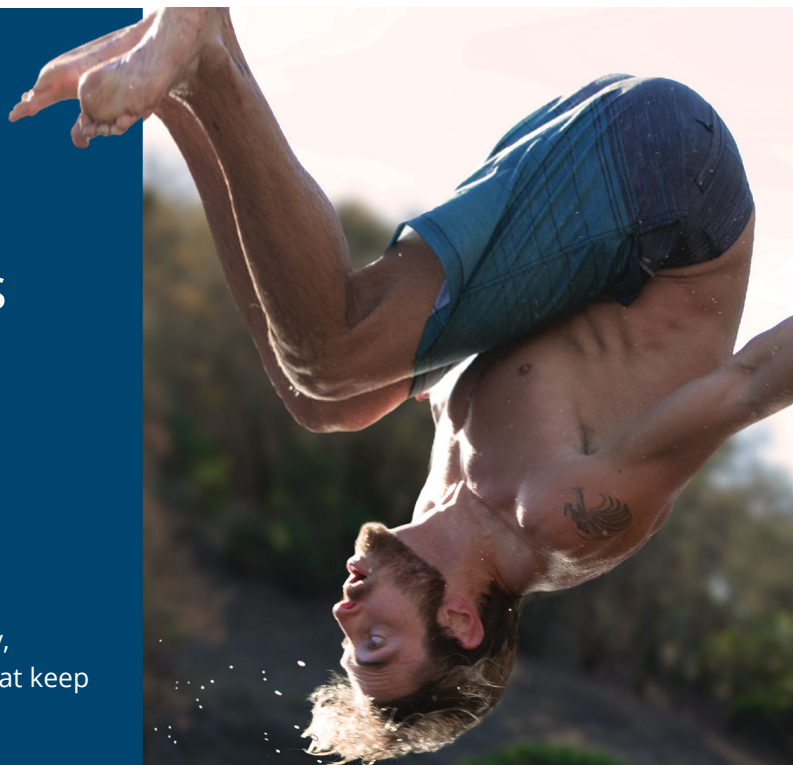
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