



**DON'T STOP BELIEVING**

*A New Subno Journey*

**2023 SHA ANNUAL CONFERENCE**

**THE SEELBACH HOTEL - LOUISVILLE, KY**

**NOVEMBER 12-14, 2023**

**CONFERENCE SCHEDULE**

# 2023 SHA ANNUAL CONFERENCE

## CONFERENCE SCHEDULE - DAY ONE

### SUNDAY - NOVEMBER 12, 2023

4:00 p.m. - 6:30 p.m.

Registration at The Seelbach Hotel - in The Rathskeller Room

#### SPECIAL EVENT

6:30 p.m. - 8:00 p.m.

Welcome Reception in the Rathskellar Room at The Seelbach Hotel (Sponsored by Phia Group)

9:00 p.m. - 11:30 p.m.

SHA Social Event: "I Want My MTV" Night - at **Howl at the Moon** located in Fourth Street Live!

### CONFERENCE ROOM AGENDA

- Sunday Reception (11/12/23) - Rathskeller Room
- Monday Breakfast (11/13/23) - Mezzanine Salons B & C & D
- Monday Meeting (11/13/23) - Mezzanine Salons B & C & D
- Tuesday Breakfast (11/14/23) - Mezzanine Salon B & C & D
- Tuesday Meeting (11/14/23) - Mezzanine Salon B & C & D

# 2023 SHA ANNUAL CONFERENCE

## CONFERENCE SCHEDULE - DAY TWO

MONDAY - NOVEMBER 13, 2023

8:00 a.m. - 9:00 a.m.	SHA Registration Desk Open / Continental Breakfast - at the Mezzanine Salons (Sponsored by Kolb Clare & Arnold, PSC)
9:00 a.m. - 10:00 a.m.	<p><b>SESSION ONE: Welcome to SHA - at the Mezzanine Salons</b></p> <p>Welcome to SHA / Opening Remarks from SHA President and Vice President / SHA Mission &amp; Goals            SHA President: Matt Monyhan - Director of Financial Operations Subrogation   Carelon Subrogation            SHA Vice President: Brian Bargender - Business Consultant, Subrogation and Other Party Liability   Humana</p> <p>Welcome to SHA / Subro 101 Workshop 2024 / Professional Certification 2024            Speaker: Michael Joseph Laffey - Founder   Other Party Liability, Inc. / Senior Partner   Laffey &amp; Associates, P.C.</p> <p>Welcome to SHA / Review of Agenda            SHA President &amp; Conference Moderator: Matt Monyhan - Director of Financial Operations Subrogation   Carelon Subrogation</p>
10:10 a.m. - 11:05 a.m.	<p><b>SESSION TWO: "SHA 2023 - 2024 Legal Update"</b></p> <p>Speaker: John Kolb - Managing Partner   Kolb Clare &amp; Arnold</p>
11:05 a.m. - 11:25 a.m.	<b>BREAK - Refreshments (Sponsored by Kolb Clare &amp; Arnold, PSC)</b>
11:30 a.m. - 12:20 p.m.	<p><b>SESSION THREE: "What Happens When the Water Cooler is Gone"</b></p> <p>Speaker: Lance K. Oliver - Founding Member &amp; Managing Partner   Russell, Oliver &amp; Stephens, PLC            Speaker: Emily Goodman - Head of the National Marketing &amp; Member Relations Teams   SHA</p>
12:20 p.m. - 12:30 p.m.	Mid-Day Remarks by Matt Monyhan (SHA President / Conference Moderator)
12:30 p.m. - 2:00 p.m.	<b>LUNCH BREAK - List of Options on Nearby Fourth Street Provided by SHA</b>
2:00 p.m. - 2:55 p.m.	<p><b>SESSION FOUR: Medicare: The Past, Present, and Future</b></p> <p>Speaker: Brian Bargender - Business Consultant, Subrogation and Other Party Liability   Humana</p>
3:00 p.m. - 3:55 p.m.	<p><b>SESSION FIVE: "Top Ten Best Lines to Use During Negotiations"</b></p> <p>Speaker: J. Matthew Stephens - Shareholder / Managing Partner   Russell, Oliver &amp; Stephens, PLC            Panelist: Hollan Holm - Associate General Counsel   Carelon Subrogation            Panelist: Adrienne Kim - Associate General Counsel   Carelon Subrogation</p>
3:55 p.m. - 4:00 p.m.	Closing Remarks
<b>SPECIAL EVENT</b>	
7:30 p.m. - 10:30 p.m.	SHA Social Event: A-HA - "Take On Me" Game Night - at The Sports & Social Club located in Fourth Street Live!

# 2023 SHA ANNUAL CONFERENCE

## CONFERENCE SCHEDULE - DAY THREE

TUESDAY - NOVEMBER 14, 2023

7:50 a.m. - 8:50 a.m.	SHA Registration Desk Open / Continental Breakfast - at the Mezzanine Salons (Sponsored by Kolb Clare & Arnold, PSC)
8:50 a.m. - 9:00 a.m.	Opening Remarks from SHA President and Vice President - at the Mezzanine Salons SHA President: Matt Monyhan - Director of Financial Operations Subrogation   Carelon Subrogation SHA Vice President: Brian Bargender - Business Consultant, Subrogation and Other Party Liability   Humana
9:00 a.m. - 9:55 a.m.	SESSION SIX: "Catch Me If You Can": Tracing Assets 21 Years After <i>Great-West Life v. Knudson</i> (2002) Speaker: Daran Kiefer - Principal / Attorney   Kreiner & Peters, Co., L.P.A. Speaker: Laura D. Schmidt - Partner   Kelly, Smith & Schmidt, PC
10:00 a.m. - 10:55 a.m.	SESSION SEVEN: "Wrap It Up, I'll Take It": How To Read A Form 5500 and Other Plan Documents Speaker: Chris Aguiar - SHA Committee Executive Director / Attorney   SHA
10:55 a.m. - 11:15 a.m.	BREAK - Refreshments (Sponsored by Kolb Clare & Arnold, PSC)
11:20 a.m. - 12:15 p.m.	SESSION EIGHT: "We Can Work It Out": Work Comp 2023 Speaker: Ryan Woody - Shareholder   Matthiesen, Wickert & Lehrer, S.C. Speaker: Paul Poulos - Lien Hearing Representative   Matthiesen, Wickert & Lehrer, S.C. Speaker: Stephen A. Smith - Insurance Litigation Attorney   Matthiesen, Wickert & Lehrer, S.C.
12:15 p.m. - 12:30 p.m.	Mid-Day Remarks / Distribution of Committee Voting Ballots
12:30 p.m. - 2:00 p.m.	LUNCH BREAK - List of Options on Nearby Fourth Street Provided by SHA
2:00 p.m. - 2:55 p.m.	SESSION NINE: "HOW TO MAKE SUBROGATION FUN AGAIN": The SHA Pep Rally Speaker: Matthew R. Falk - Managing Attorney   Falk Legal Group Speaker: Lisa Boero - Attorney   Security Health Plan Speaker: Sara Skrzeczkoski - Attorney   Security Health Plan Speaker: Joel Tilleson - Attorney   Falk Legal Group
2:55 p.m. - 3:15 p.m.	Closing Remarks & Voting of SHA Board & Executives
SPECIAL EVENT	
3:30 p.m. - 6:15 p.m.	SHA Social Event: "I'll Be Back" Night - at Old Seelbach Bar located in the conference hotel