

Agenda

2025 Lockton HR & Benefits Retreat - Charlotte

JW Marriott | 600 S College St, Charlotte, NC 28202

Monday, March 3, 2025

JW Marriott

11:30 AM	Registration and Lunch	Grand Ballroom (3rd floor)
1:00 PM	Welcome and Opening <i>Paul Bruno, President - Carolinas, Lockton</i>	Grand Ballroom (3rd floor)
1:15 PM	Post-Election Compliance Update <i>Mark Holloway, J.D. SVP Compliance Services, Lockton</i>	Grand Ballroom (3rd floor)
2:00 PM	Break	
2:15 PM	Our Relationship with Time: Enhancing productivity, balance, and well-being in modern organizations <i>Pam Evanson, Professional Business Coach, Lappin180</i>	Grand Ballroom (3rd floor)
3:00 PM	Break	
3:15 PM	Innovating for Guaranteed Retirement Income <i>Creative Planning & State Street & ARS</i>	Grand Ballroom (3rd floor)
4:00 PM	Evaluating Alternative Risk Pools and Captives <i>Slayton Rous & Page Bell, Lockton, Alternative Risk Solutions</i>	Grand Ballroom (3rd floor)
4:45 PM	End of Monday Sessions	
5:30 PM	Cocktail Reception	Grand Ballroom (3rd floor)
6:30 PM	Dinner	Grand Ballroom (3rd floor)
8:00 PM	Meet-up / Dessert bar	Pre-Function (3rd)

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Tuesday, March 4, 2025

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8:00 AM **Breakfast**

Grand Ballroom (3rd floor)

8:30 AM **2025 Health and Welfare Plan Governance Checkups**
Meredith Silliman J.D. Bryan Cave Leighton Paisner LLP

Grand Ballroom (3rd floor)

9:15 AM **Directing Specialty Care, Optimizing Cost and Quality**
Donnie Harms, National Account Director, Summus

Grand Ballroom (3rd floor)

9:45 AM **Break**

10:00 AM **Insights into the future of Healthcare, The story behind the Spousal HRA Solution**
Priyang Shab, CEO/Founder, Healix Health

Grand Ballroom (3rd floor)

10:30 AM **Break**

10:45 AM **Perspective on Current Market, Rx Solutions for Plan Sponsors, and Innovation Pipeline**
Aleata Postell - Health & Wellness Group Director, Specialty Rx Business Dev and Ops, Walmart Rx

Grand Ballroom (3rd floor)

11:45 AM **Closing, Lunch and Departure**

Grand Ballroom (3rd floor)