

“Self-Funding 101”

A presentation to the Institute of Management Accountants



The Association of
Accountants and
Financial Professionals
in Business

Dan Cattaneo
CEO, Beneflex Insurance Services, Inc.



Wed. April 11, 2012 • Dinner Meeting 6:00 P.M. \$25 Earn 1 CPE
Casa Blanca Restaurant 330 State Street, Santa Barbara



Topics for Discussion:

- Everything you Ever Wanted to Know About Self Funding
- Why should companies be interested in self funding their group health benefits?
- Limiting employer liability
- Specific and Aggregate stop-loss coverage
- Selecting a Broker and TPA for your Self Funding Plan



SEATING IS LIMITED!
RSVP to sbcima@gmail.com

Dan is highly skilled in all aspects of employee benefits. He is considered in private industry circles as an authority on self-funding arrangements, and has in-depth knowledge of the impact of current legislation on employer-provided benefits. He is a strong supporter of Human Resources associations in the Tri-Counties, and has been a regular guest speaker for Human Resources Management classes at UCSB.