

BUCA VS

*Order Before Growth
Structure Before Scale*

Bluebonnets

DATE	VENUE	TIME	CAPACITY
Thursday, April 23	The Statler Hotel Dallas	11:00 AM to 4:30 PM	Limited

WHAT IS THIS?

A private working summit for benefits professionals done with the BUCA renewal cycle, ready to engineer something better. One room, one thesis, and the right people.

- No Booths.
- No Pitches.

Real Plan Data.

Case studies built on actual claims and numbers your clients can't ignore.

Live Q&A.

The Broker Hot Seat puts every speaker on the record.

Journal-First format.

Leave with a documented framework, not a slide deck.

Dallas Setting.

Built for brokers operating in the most competitive benefits market in the country.

WHO SHOULD BE IN THE ROOM

Senior Benefits Brokers and Consultants

Advising mid-market employers ready to move beyond the fully-insured treadmill.

Third-Party Administrators

Designing self-funded architecture where funding, network, and pharmacy actual hold.

Employer CFOs and HR Leaders

Running benefits for 10 - 2000 plus lives and ready for a plan that performs, not just renews.



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THE AGENDA

11:00 AM | Thomas Wagner
Welcome and Cost Containment

11:30 AM | Brett Morris
Employer Funding Strategy

12:00 PM | Everyone
Lunch and networking

12:30 PM | Kerix Health
Direct Primary Care Navigation

1:00 PM | Veracity Benefits
Pharmacy and Benefits Navigation

2:00 PM | Dante Panella
Bundled Pricing and Specialty
Strategy

2:30 PM | David Balat
Direct Care Alliance

3:00 PM | Jarred Pierce Network
Access and PPO Strategy

3:30 PM | Panel Town Hall
Broker Hot Seat

4:00 PM | Thomas Wagner
Closing Remarks, followed by
Happy Hour and Networking

THE SPEAKERS

Thomas Wagner
Zenith Risk Solutions

Brett Morris
Samaritan Fund Program

Ashley Jones, PharmD
Veracity Benefits

Dante Panella
Price MDs

David Balat
Direct Care Alliance

Jarred Pierce
Unity Preferred Network

Tim Hyde
Veracity Benefits

Courtney Dewitt
KerixHealth

