

CHAPTER PROGRAMS FEBRUARY 2021 – FEBRUARY 2022



CHAPTER/DATE	PROGRAM	SPEAKERS
Alberta 04/07/21	Webinar: Western Canada's Economy: What can we expect for the second half of 2021?	Todd Hirsch, VP, Chief Economist, ATB Financial
Alberta 06/08/21	Webinar: Let's Talk Mental Health, Burnout, and the Post-Pandemic Workplace	Mary-Lou MacDonald
Alberta 09/23/21	Webinar: How Can You Make Your Benefit Plans More Inclusive for Members of the LGBTQ2S Community	Allison Tremblay, Attorney and Partner, Victory Square Law
Alberta 11/23/21	Webinar: What's going on in Small and Mid-Sized Drug Plans	Dave Patriarch, Mainstay Insurance Brokerage
Atlantic Canada 06/11/21	Webinar: Group Benefits Hot Topics	Barbara A. Martinez, Drug Solutions Daria O'Reilly, PhD, MSc, TELUS Health Bobby Currie, B.Sc. Pharm., RPh., Clinical Pharmacy Godfrey Jerry, AVP, Manulife Natacha Riopel, MBA, CEBS, Homewood Health
Atlantic Canada 10/22/21	Webinar: Group Benefits Hot Topics	Devon Forshner, CEBS and Nicole Stibbe, HUB Alex Carducci, Manulife Mathieu Vézina and Jaafer (Jeff) Reda, Telus
Baltimore 06/17/21	Webinar: Medical Stop Loss – Recent Trends and Key Catastrophic Claimant Impacts, including COVID-19, Specialty Drugs and Orphan Therapies	Ryan Siemers, CEBS, ISCEBS-Fellow, Aegis Risk
Birmingham 03/03/21	Webinar: A Simple Guide to Helping Employees with Medicare	Eric Smith, Owner-Agent, Medicare Advisors of Alabama
Birmingham 04/15/21	Webinar: ARPA COBRA Subsidies	Claire Martin, Associate, Maynard Cooper
Birmingham 07/15/21	Webinar: The Results are in: Health Plan Takeaways from the Employee Benefits Survey	Justin Held, CEBS, Senior Research Analyst, IFEBP
British Columbia 03/08/21	Webinars: Fundamentals of Group Benefit & Pension Plans (March 8-11) Group Benefits: Health, dental and disability plans, Underwriting, Benefit plan administration Group Retirement: Government retirement programs, Defined contribution plan basics, Defined benefit plan basics	
British Columbia 05/20/21	Webinar: Rethinking Retirement: How the "new retirement" will impact Plan Sponsors and Plan Members	Barry LaValley, Presenter, Retirement Educator
British Columbia 06/17/21	Webinar: Legal Update and Legislative Developments affecting Pension and Benefit Plans	Megan Kaneen, Partner, Lawson Lundell LLP

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British Columbia 09/30/21	Webinar: The Workplace After the Pandemic: Navigating Next Steps	Gradin Tyler, Partner, Mathews Dindale & Clark Cameron Wardell, Mathews, Dinsdale & Clark
British Columbia 11/16/21	Webinar: The Pandemic After the Pandemic – The Future of Mental Health	Joe Blomeley, Exec V, Individual, Public Sector & Mental Health, GSC
Capital 12/2/21	Webinar: Organizational Wellbeing Market Update	Kathleen Schulz, MS, CHES
Carolinas 09/30/21	Webinar: How to Shift from Financial Uncertainty to Financial Wellness	Jeffrey B. Miller, Acct Exec, Team Lead Financial Wellness and Engagement, PlanSmart, MetLife
Carolinas 02/24/22	Webinar: Benefits Compliance Update-What's Happening in Washington, DC	Katharine E. Marshall, JD, Principal, Law & Policy Lindsey Sommers, JD, Principal, Regulatory Resources Mercer
Central Indiana 06/21/21	Webinar: Unmasking the Co-Conspirators and Factors Contributing to Your High-Cost Pharmacy Claims	Susan Hayes, Principal and Founder of Pharmacy Investigators and Consultants (PIC).
Central Indiana 07/21/21	Webinar: Employer Success Begins with Using Hospital Price and Quality Evidence	Gloria Sachdev, PharmD, President, CEO, and Board Chair, Employers' Forum of Indiana
Central Indiana 12/16/21	Webinar: Trends with Benefits	Brea Dantin, Co-Founder, Retirement Plan Advisor, ProCourse Fiduciary Advisors
Central Pennsylvania 06/16/21	Webinar: 2021 Legal Update	Stephanie Rawitt, Clark Hill
Central Pennsylvania 09/21/21	Webinar: Remember, We All Rise When We Lift Others...Keys to Wellbeing and Building Resilience in Ourselves and Others	Michael Diller, Licensed Psychologist and Director, WellSpan Employee Assistance Program
Central Pennsylvania 11/16/21	Webinar: Reengaging Employees in a Post-Pandemic World	Kelsey Bradbury, Senior Consumer Insights Consultant, Lincoln Retirement Plan Services
Chicago 09/16/21	Webinar: What the CHRO Wants You to Know	
Chicago 12/9/21	Webinar: Important Factors to Consider in Selecting an Insurance Broker	Kathleen Schulz, MS, CHES
Cincinnati/Dayton 06/10/21	Webinar: Understanding Racial and Social Barriers to Health	Ashley Clos, Dir Community and Social Responsibility, The Christ Hospital Health Network
Cincinnati/Dayton 09/08/21	Webinar: Benefits Communication Planning for Diverse Audiences	Lindsay Rink, Communications Consultant, USI
Colorado 04/21/21	Webinar: Benefits 101	Laura Earley, CEBS, Acct Exec, IMA
Colorado 05/05/21	Webinar: Medicare Options at Age 65	Laura Earley, CEBS, Acct Exec, IMA

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Colorado 01/19/22	Webinar: Colorado Paid Family Leave	Marti Cardi, Vice President of Product Compliance, Matrix Absence Management
Colorado 02/23/22	Webinar: The Family and Medical Leave Act and Integration with The Americans with Disabilities Act	Marti Cardi, Vice President of Product Compliance, Matrix Absence Management
Dallas/Ft. Worth 02/11/21	Webinar: The Basics of Medicare	Leigh Bennett, Medicare Insurance Director, IMA Wealth
Dallas/Ft. Worth 03/11/21	Webinar: Recent Legislative Changes to Health & Dependent Care FSAs	Sarah Borders, CEBS, Principal & Founder, Benefits Compliance Solutions
Dallas/Ft. Worth 04/08/21	Webinar: Non-Fee-For-Service Primary Care: What Is It? How Is It Different? Why Is It Better?	Eric Bricker, A Healthcare Z
Dallas/Ft. Worth 05/13/21	Webinar: Continuing Education (CE) Day <ul style="list-style-type: none"> • ERISA Compliance 101 • Through the Looking Glass: Overview of Transparency Rules • One Man's Pain is Another Man's Profit 	Carolyn McNairy, TASC Nikki Chriesman-Green, Foster & Foster Eric Johnson, ComedyCE.com, LLC
Dallas/Ft. Worth 06/10/21	Webinar: The Results are in: Health Plan Takeaways from the Employee Benefits Survey	Justin Held, CEBS, Senior Research Analyst, IFEBP
Dallas/Ft. Worth 08/12/21	Webinar: Bringing Benefits to Life in a Virtual World	Paula Fulghum, Chief Innovator, Innovate HR Aynsley Pletcher, Operations Manager, Innovate HR
Dallas/Ft. Worth 09/09/21	Webinar: Onsite & Offsite Safety Concerns	Jeff McKissack, President, Defense By Design
Dallas/Ft. Worth 11/11/21	Webinar: Key Considerations in Managing and Delegating Fiduciary Responsibilities	Brad Altman, AIF, RPA, Assistant Vice President Mechiel Lake, CEBS, AIF, CRPC, CPFA, Sr. Account Executive, Retirement Services Jeff Broaddus, CPFA, Advisor, Retirement Services, Marsh McLennan Agency
Dallas/Ft. Worth 01/13/22	Webinar: Spotting Mental Health Parity Issues Before the DOL Comes Knocking	Kirsten Garcia, Counsel at Haynes and Boone, LLP
Dallas/Ft. Worth 02/10/22	Webinar: Healthcare Price Transparency: Clear as Mud	Gentry Lynn, CEBS, Senior Sales Consultant, Healthcare Bluebook
Detroit 04/28/21	Webinar: Fiduciary Risk Mitigation & Cost Saving Opportunities for Retirement Plans	Mitch Milless, Sr VP, Marsh & McLennan
Detroit 08/04/21	In Person: Employees Mental Health in America, Pre, During, and Post COVID-19	Kent Sharkey, President, Chief Executive Officer, Founder, Ulliance, Inc.
Detroit 11/16/21	In-Person: Culture as a Competitive Advantage	Susan Morgan Bailey, Sr VP, Culture & Wellbeing Practice Leader, Marsh & McLennan Agency

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Greater Boston 05/25/21	Webinar: Evolving policies and procedures for returning to work, meeting virtually and continued remote work.	
Greater Boston 07/21/21	Webinar: Retirement	
Greater Boston 10/07/21	Webinar: Health & Welfare	
Greater Boston 11/17/21	Webinar: Are You Battling the Great Resignation?	Sandra Kearney, MSOL, CEO/President Darlene Trainor, VP Northeast Sales Human Power Solutions
Greater Philadelphia 08/25/21	Webinars: Identity Protection Theft CE Courses	
Greater Philadelphia 09/15/21	Webinar: Strategies to Manage Retiree Life Liabilities	MetLife
Greater Pittsburgh 05/20/21	Webinar: Results - Mercer's National Survey of Employer-Sponsored Health Plans in 2020.	Gloria Mathie, JD, CEBS, Principal, Health and Benefits Business, Mercer
Greater Pittsburgh 10/14/21	In-Person: Benefits Day <ul style="list-style-type: none"> • An Overview of Behavioral Health In The Time Of Covid-19 • The Long Winding Road: The Path to EEOC Wellness Program Regulations • Delivering Powerful Messages: Communications Strategies to Reach Your Audience Every Time • Health Care 101 • Navigating Mandatory Paid Leave • Regulatory Update • Group Disability 101 • Retirement 101 	Alin Severance, M.D., UPMC Health Plan Joshua Verdi, Highmark Health Natalie Gillespie, Allegheny Technologies Jim McTiernan, Arthur J. Gallagher Holly Moyer, Alliant Insurance Services Molly Lacovani and Jeannette Koxloff, Aon Joe Stoll, The Hartford Nate Trotman, Arthur J. Gallagher
Houston 09/14/21	Webinar: How COVID has Impacted Savings and Retirement and What You Can Do to Help Employees Reset	Robert Massa, ChFC, CEBS, AIF, CFP, CBC, Managing Director, Qualified Plan Advisors
Houston 10/06/21	Webinar: Post-COVID Underwriting	Doug Nistetter, ASA, MAAA, Sr VP, AON Eric Gunderson, Sr Dir Underwriting, BCBS of TX
Houston 11/17/21	In-Person: Company 401K Audits & Compliance Standards	Jennifer Patschke, CPA, EBP Audit Practice, Melton&Melton Kim Marek, CPA, Partner, Melton & Melton
IS Chapter Webcast 02/03/22	Webinar: The Great Resignation to The Great Migration	Allen Koski, CEBS, President and CIO, Insured Nomads
Kansas City 04/20/21	Webinar: COBRA and Premium Assistance under the American Rescue Plan of 2021	Cynthia Smith, Senior Benefits Advisor, U.S. DOL

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Kansas City 05/26/21	Webinar: Benefit Administration Systems	Jennifer Burke, Employee Benefits Specialist Brock Glessner, Director of Sales - Group Benefits Principal Financial Group
Los Angeles 09/08/21	Webinar: What Is an Employer's Role in the Financial Well-Being of Employees?	
Middle Tennessee 04/21/21	Webinar: Best Practices for Productive Vendor Relationships	Suzanne Mahler Brown, CEBS, Director of Benefits, Granges Americas Inc
Middle Tennessee 06/24/21	Webinar: DOL Electronic Delivery Rules	Linda Green, APA, CEBS, ISCEBS-Fellow, Acuff & Associates
Middle Tennessee 10/21/21	Webinar: Mental and Behavioral Health Strategies for Employers	Eric Parmenter, CEBS, CEO, OnSombre, Inc.
Milwaukee 05/13/21	Webinar: Webinar: The Results are in: Health Plan Takeaways from the Employee Benefits Survey	Justin Held, CEBS, Senior Research Analyst, IFEBP
Milwaukee 11/5/21	Webinar: What's Wellbeing Got to Do with The Employee Experience?	Robin Kahn, Dir, Health & Benefits Integrated Wellbeing Strategist, Willis Towers Watson Ray Baumruk, Senior Dir, Willis Towers Watson
Milwaukee 12/2/21	In-Person and Webinar: Health Plan Legal Update: CAA, MHPAEA and More, Oh My!	John Barlament, Attorney and Partner, Quarles and Brady
Milwaukee 02/24/22	In-Person & Webinar: Wish You WELLness: Your Employee Financial Wellness Delivery Plan!	Michael Sheppard, CFP, CPFA, CEPA, Managing Partner and Founder, IronwoodDrive Financial Group, LLC
Nebraska 05/11/21	Webinar: Business Resiliency in the Era of COVID	
New York Metro 01/26/21	Webinar: Meeting the Needs of Employees in the Time of Covid	Rosemary Manning Hughes, Senior Consultant, EPIC
New York Metro 02/24/21	Webinar: 2021 Plan Sponsor Attitudes/Trends & Forecasted 401k Changes with Biden Administration	Will Kempton, Regional VP, Fidelity (FIAM) John Cunningham, Executive VP, Alliant
New York Metro 03/24/21	Webinar: Pharmacy Benefits 2021: Current Landscape and Trends	Dave Lee, MBA, President, NFP Rx Solutions Nelly Rose, PharmD, AVP, NFP Rx Solutions
New York Metro 05/19/21	Webinar: Benefits 360 <ul style="list-style-type: none"> • How COVID is Driving Changes in Care Access and Utilization • Make your Well-Being Strategy a Competitive Advantage • What's the Buzz Around Financial Well-Being? Redesigning the Employee Experience; Preparing the Workforce for a Transformed World	Rosemary Manning Hughes, Principal, Epic Betsy Nota-Kirby, VP, Marsh & McLennan Agency Robert Kelly, Dir Fin Consultant, Marsh & McLennan Eric Ryan, Account Executive, MetLife

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New York Metro 05/25/21	Webinar: American Rescue Plan Act of 2021 (ARPA)	Art Grutt, CEBS, CEO and Managing Partner, Cambridge Life Brokerage
New York Metro 06/23/21	Webinar: Inclusion & Diversity	Charlotte Holler, MBA, Director, Willis Towers Watson Bernadette O'Hara, ASA, Director, Willis Towers Watson
New York Metro 08/10/21	Webinar: Employee Benefit Plans Form 5500 and Beyond Update	Louis F. LiBrandi, CEBS, Anthony Bianchi, CEBS, PKF Ashley Mayer, CPA, PKF O'Connor Davies
New York Metro 09/23/21	Webinar: Key Tactics and Strategies for Retirement Benefit Savings	Tom Armstrong, VP, Customer Analysis, and Insight, Voya Financial
New York Metro 10/26/21	Webinar: Workplace Benefit Plans - How Insurance Offerings May Help Protect Your Employees' Financial Wellness & Retention	Javier Lugo, CLU, ChFC, CLTC, Worksite Education Program Speaker, Prudential
New York Metro 11/18/21	Webinar: Transparency Provisions Update on 2010's Patient Protection and Affordable Care Act (ACA) AND Consolidated Appropriations Act of 2021 (CAA)	Mandy Bartoshesky, J.D., M.P.H., Area Senior Vice President, Compliance Counsel, Gallagher
New York Metro 02/23/22	Webinar: Retirement Plans Strategies for Employees	Benjamin Goodman, Vice President, TIAA
Northern California 04/13/21	Webinar: Health & Welfare Legislative and Regulatory Updates and Retirement Legislative and Regulatory Updates	Sarah Kanter & Freeman Levinrad, Trucker Huss
Northern California 11/17/21	Webinar: Understanding Racial and Social Barriers to Health	Ashley Clos, Dir. Community and Social Responsibility, Christ Hospital Health Network
Northern New Jersey 03/16/21	Webinar: Health & Welfare Legislative Updates	Rosemary Manning Hughes, Senior Consultant & Principal, EPIC
Northern New Jersey 05/18/21	Webinar: COBRA Subsidy	Danielle D'Abbraccio, DOL
Northern New Jersey 10/26/21	Webinar: Updates on Recent Activity Under the Mental Health Parity and Addiction Equity Act (MHPAEA)	Elena Lynett, JD, VP, Senior Benefits Consultant, National Health Compliance Practice, Segal
Orange County 07/15/21	Webinar: Love It / Hate It – A New HRIS System	Kelsey Woods, H. G. Fenton Wayne Pacholl, Irvine Company
Pacific Northwest 04/22/21	Webinar: Legislating LTC: Washington State's LTC Trust & Tax	Sandra Wood, CEBS, Chief Benefits Consultant, The Benefits Academy
Pacific Northwest 10/12/21	Webinar: Do We Follow a Flawed Investment Structure?	Brian Schroeder, Founder, OCIO Monitor
Richmond 04/01/21	Webinar: VHHA Covid Updates	Matt Strader, Senior Director, Virginia Hospital and Healthcare Association
Richmond 11/04/21	Webinar: Mental Health in the Workplace	Patti Rittling

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St. Louis 04/14/21	Webinar: Supporting Employee Well-Being in Uncertain Times	MetLife
St. Louis 10/06/21	Webinar: Mental Health Parity and Addiction Equity Act	Rich Glass, Attorney, Mercer
SW Ontario 04/26/21	Webinars: Fundamentals of Pensions and Group Benefits (8 days) <ul style="list-style-type: none"> • Introduction to Employee Benefits • Benefit Plan Provisions and Considerations • Benefit Administration • Underwriting 101 • Introduction to Social Programs & Private Plans • Plan Governance and Administration • Investments 101 • Member Education & Communication 	
SW Ontario 06/09/21	Webinar: Retirement: How ready are your employees for life after work?"	Mike Drak, Best Selling Author
SW Ontario 09/29/21	Webinar: The Pandemic After the Pandemic – The Future of Mental Health	Joe Blomeley, Executive VP, Individual, Public Sector & Mental Health, GSC
Tampa Bay 02/11/21	Webinar: COVID-Relief Bill, Impact on your FSA and Employer Options	Derek Ashton, CEBS, Client Relationship Consultant, Medcom Benefits Solutions Nicolette Rios, CFC, President, North Coast Admns
Tampa Bay 04/25/21	Webinar: Panel Discussion (retirement plans and financial wellness)	Bradley D. Gayheart, Managing Director, Sarasota Private Trust Company Sean Orick, Partner for Retirement Partner Advisors
Tampa Bay 11/17/21	In-Person: Genomics and DNA Testing - A New Employee Benefit Strategy for Employers	Darrell Smith, Regional Sales Director, Southeast, Genomic Life
Toronto 05/31/21	Webinars (1/day – 5 days): Fundamentals of Group Benefits Plans <ul style="list-style-type: none"> • Group Health & Dental • Life Insurance & Wellness • Disability Management • Underwriting • Ancillary Benefit 	Nicolas Landry, Bisrat Brown, Judy Plotkin, Lianne Clarke, Maria Covone, Lizann Reitmeier
Toronto 09/21/21	Webinar: Cybersecurity Risk - It's an enterprise risk that extends beyond the IT Department!	Patrick Bourk, B.A., LL.B., HUB International Canada Claudiu Popa, CISSP CIPP PMP CISA CRISC, CEO, Informatica Corporation
Toronto 11/17/21	Webinar: Diversity, Equity & Inclusion	

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Twin Cities 04/08/21	Webinar: Five Tips to Improve HAS Engagement	Nate Black, VP, Voya Financial
Twin Cities 04/28/21	Webinar: Pandemics, Politics: Biden stimulus and its impact on ACA	Cherie Coenen, EVP, Corporate Administration Kyle Scott, AVP, Compliance from Health e(fx)
Twin Cities 05/25/21	Virtual 2021 Employee Benefits Spring Seminar (Two Days) <ul style="list-style-type: none"> • What a Long Strange Road It's Been • Workplace Prevention Strategies to Impact the Mental Health Crisis • Total Rewards and The Associate Experience - Wipfli's Journey • Planning For Retirement Beyond the Financials 	Ed Fensholt, Lockton Cortney Silva, CDMS, LISW, Prudential Kristin Tugman, PhD, Prudential Andre Rooks, Mercer Melissa Klade, WIPFLI Alan Spector, Author & Independent Consultant Rick Storms, Independent Consultant
Twin Cities 08/19/21	In-Person: Trust and Behavioral Finance: Ethical Habits to Reinforce Trust in Business Relationships	Rick Storms, CEBS, Parish Administrator, Church of St. Odelia
Twin Cities 08/24/21	In-Person: Legislative and Regulatory Updates for Retirement Plans	Steven E. Grieb is Senior Compliance Counsel, Financial and Retirement Services, Arthur J. Gallagher & Co
Twin Cities 09/29/21	Webinar: A Guide to Benefits Equity: Strategies, Guides and the Power of Curiosity	Patricia Jespersen, CCO, EmployeeEXP
Twin Cities 11/12/21	Webinar: Biden's Vaccine Policy - A Coffee Conversation	
Twin Cities 11/17/21	Webinar: Telemedicine – Historical Perspective and What the Future Holds	Kate Ward, UnitedHealthcare Global Dr. Arwindekar, North American Medical Director, UnitedHealth Global Solutions
Twin Cities 12/16/21	Webinar: New Shape of Work	Lee Bannister, Partner, Mercer, People Transformation and Strategy
Twin Cities 01/26/22	Webinar: Don't be surprised by the No Surprise Act	Kat Lacy-Wilson, JD LLM, USI
Webinar Coalition 02/10/21	Webinar: Understanding ADP/ACP Testing for Your Defined Contribution Plan	Jarred Wilson, VP, Consulting Actuary, Segal
Webinar Coalition 03/10/21	Webinar: Roadmap to Medicare: Successfully Charting a Path	Tracy Russo, President, HTA Financial
Webinar Coalition 04/15/21	Webinar: Useful Health Benefit Trends & Insights for 2021	Kirk Czonstka, GBA, Principal, Mercer Nick Albert, FSA, MAAA, Senior Associate, Mercer
Webinar Coalition 05/12/21	Webinar: Compare & Contrast: SEC Best Interest vs. DOL Standard of Conduct	Joan Neri, Esq., Attorney, Faegre Drinker Biddle & Reath LLP

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Webinar Coalition 06/10/21	Webinar: MetLife's 19th Annual Employee Trends Study: Benefits Strategies for 2021 and Beyond	Alex Vachon, GBA, MBA, Regional Dir, MetLife Mari Noyes, Plan Smart Account Executive, MetLife Matt Hall, VBS, GBDS, Specialist Dir, MetLife
Webinar Coalition 07/21/21	Webinar: Evaluating Retirement Plan Performance and Diversification	Brian Schroeder, Founder, OCIO Monitor
Webinar Coalition 08/18/21	Webinar: Enhancing Employee Engagement in a Post-Pandemic Workforce	Lindsay Rink, Communications Consultant, USI
Webinar Coalition 09/30/21	Webinar: Cybersecurity	Pat Lefemine, Senior VP and Chief Information Security Officer (CISO, Lincoln Financial Group)
Webinar Coalition 10/20/21	Webinar: Employer Strategies Toward Effective Drug Pricing Models	Josh Golden, Senior Vice-President, Strategy, Capital Rx
Webinar Coalition 11/20/21	Webinar: Empowering Your Employees' Financial Wellness into Retirement: How Talk to Your Employees About Health Savings Accounts	Kevin Robertson, Senior Vice-President, Chief Revenue Officer, HSA Bank
Webinar Coalition 12/16/21	Webinar: Regulatory Update for 2022: Jump Start Your Preparation for the New Year	Molly Iacovoni, J. D., Senior Vice President, Aon Jeannette J. Kozloff, J.D., Vice President, Aon
West Michigan 11/2/21	In-Person: Annual Legislative Update	Norbert Kugele, Partner, Justin Stemple, Partner, Warner Norcross and Judd LLP