

Finance Caucus Highlight

For finance and accounting professionals, this conference formalizes the concept of networking into real-time discussions about very real business issues facing all of us today. A flexible format allows for informative, interactive, and free-flowing discussions. Learn from your peers in other Blue plans as they share first-hand experiences with issues raised by the audit firms or with topics such as planning, forecasting, and budgeting, the Sherlock Study, fraud prevention, the Model Audit Rule, or enterprise risk management to name just a few. Find out what others have done to effect process improvement in their departments, and with today's difficult labor market, engage in discussions about recruiting, employee retention and succession planning.



Please join us for what's been considered a very valuable experience by past attendees.

Finance Caucus Agenda

Monday, July 14

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| 8:00 – 9:45 | General Session |
| 9:45 – 10:00 | Break |
| 10:00 – 10:30 | Welcome / Introductions
Dave Marcantuono , Caucus Chair
Assistant Director, Financial Accounting & Reporting, Regence |
| 10:30 – 11:30 | Roundtable Discussion <ul style="list-style-type: none">➤ Audit Firm Relations➤ Recent Issues Raised by Audit Firms➤ Model Audit Rule (SOx)➤ State Exams, Risk-Focused Exams & Lessons Learned |
| 11:30 – 1:00 | Working Lunch – Roundtable Discussion (cont'd)
<i>We'll restart the conversation at 11:45 a.m.</i>
<i>Note: Lunch will occur within this time frame; boxed lunches will be delivered outside the caucus rooms.</i> <ul style="list-style-type: none">➤ Pensions / FAS 158 / Pension Protection Act➤ Tax / Fin 48➤ International Accounting Standards / Principles-Based Accounting➤ Trends in Claims Observations➤ Claims Reserves➤ Medicare Accounting Issues➤ Product Mix Questions➤ RBC / Surplus Regulation➤ Schedule T➤ Blue Bank |

Monday, July 14 continued

- 1:00 – 2:00 **Joe Zolecki, Shari Westerfield, Dean Todaro**, Financial Regulatory Services, Blue Cross and Blue Shield Association
- 2:00 – 2:15 Break
- 2:15 – 3:45 Roundtable Discussion
- Sherlock Study
 - Planning Process / Budgeting / Forecasting
 - Cost Reduction
 - Provider Reimbursement Strategies
 - Business Partnering
 - Corporate Responsibility/Sustainability Reporting
- 3:45 – 4:00 Evaluations / Giveaways
- 4:00 Adjourn

Tuesday, July 15

- 8:30 – 10:00 General Session
- 10:00 – 10:15 Break
- 10:15 – 11:45 Roundtable Discussion
- Metrics / Dashboards / Balanced Scorecards
 - Enterprise Risk Management
 - Fraud Prevention & Training
 - Process Improvement
 - Best Practices Discussion
- 11:45 – 12:45 Economic Outlook / Market Update
Eric Tanaka, Senior Consultant, R.V. Kuhns & Associates, Inc.
- 12:45 – 1:00 Evaluations / Giveaways
- 1:00 Adjourn

Wednesday, July 16

- 8:00 – 9:15 Roundtable Discussion
- Innovative Ways to Hire Top Talent
 - Top Talent Retention
 - Managing Generational Diversity
 - Is 'Work From Home' Working Out?
 - Talent Development / Training Best Practices
 - Succession Planning
 - Intern Programs
 - Departmental Professional Licensing

Wednesday, July 16 continued

- 9:15 – 9:30 Evaluations / Giveaways
- 9:30 – 9:45 Break
- 9:45 – 11:30 General Session and Closing

CPE Information:

Program Level: Overview

Prerequisites are not required / advanced preparation is not required

Group-Live program

CPE Credit Available: 11 CPEs

