



ICE Committee Healthcare Reform Workshop

August 29, 2013 - 7:30 AM – Noon
Courtyard by Marriott Houma

Sponsored by:



Occupational Medicine Services, L.L.C.

Presented by:



Agenda & Workshop Topics

7:30 am **Breakfast & Sign In**

8:00 am **Andy Impastato, VP Client Compliance**

BancorpSouth Insurance Services, Inc.

- Exchange notices
- Fees
- Plan design changes
- Wellness rules
- Employer mandate

9:00 am **Charles Theriot, CPA/CFF**

Charles C. Theriot & Company, Certified Public Accountants

- Tax aspects of health care reform
- Medicare tax
- Control groups- type and rules of Control Groups
- HRA form
- Small business tax credit
- Reporting

10:00 am **Break**

10:15 am **Mike Bertaut, MBA, CHC, PAHM**

Healthcare Economist/Exchange Coordinator

Blue Cross Blue Shield of Louisiana

- Panel moderator
- How health care reform impacts the private insurance company
- Community rating and plan changes
- Exchange operations
- How individual companies will be affected by health care reform
- Control and associated groups

10:45 am **Kerry Drake, Regional President, Louisiana**

BancorpSouth Insurance Services/Wright & Percy

- What does health care reform mean to me?
- Health care reform strategy and implementation
- Employers examples of driving change
- Calculating the financial impact of health care reform
- Managing health care reform law
- Pros and Cons of offering coverage

11:15 am **Panel Discussion/Q&A**

PANELIST:



Andy Impastato
Vice President – Legal & Compliance
BancorpSouth Insurance Services

Andy Impastato serves as Vice President of Client Compliance and is responsible for providing regulatory guidance on new legislation, HR management and benefits administration. Prior to joining the BancorpSouth Insurance Services/Wright & Percy team, he served as Manager of Legal Operations for Blue Cross & Blue Shield of Mississippi.

Impastato has been practicing law for over ten years and has a history of providing legal and compliance advice on employee benefits matters, including all aspects of health and welfare plan administration. Impastato is extremely knowledgeable in all areas of human resource management and administration with special emphasis on compliance.

Impastato holds a Bachelor of Arts degree from Mississippi State University and a Juris Doctor degree from Mississippi College School of Law.



Charles C. Theriot
CPA/CFF
Charles C. Theriot & Company, Certified Public Accountants

Charles Theriot, a native of Baton Rouge, has lived and practiced public accounting in Houma, Louisiana for over 39 years. He graduated from LSU in Baton Rouge with a B.S. in economics (1971) and a M.S. in accounting (1972). He has been certified in financial forensics by the American Institute of Certified Public Accountants. He specializes in all aspects of federal and state tax planning and reporting, assisting individuals in buying, selling, structuring, and financing business transactions, and assisting parties and their legal counsel in litigation-related matters.

Charles was an adjunct professor of accounting at Nicholls State University for eight years. He has been admitted to the bar of the United States Tax Court as a non-attorney. He has qualified as an expert witness on numerous occasions in federal and state district courts throughout Louisiana and in U.S. Bankruptcy court in New Orleans. He has testified in matters involving business valuation, federal and state taxation issues, commercial damages with special emphasis on lost profits, unfair pricing disputes, antitrust and unfair trade practices, patent and copyright infringement. He was an organizer and director of Synergy Bank in Houma. He is a charter member and treasurer of the South Central Industrial Association



Michael R. Bertaut, MBA, CHC, PAHM
Healthcare Economist/Exchange Coordinator
Blue Cross Blue Shield of Louisiana

Michael Bertaut is a Healthcare Economist and Exchange Coordinator for Blue Cross and Blue Shield of Louisiana. He is a Certified Health Consultant and Professional of the Academy

of Healthcare Management, with 25 years of analytical experience in the healthcare, telecom and retail sectors. He sits on the advisory board of the National Healthcare Reform Conference and Magazine, and was a recent keynote speaker at the International Medical Tourism Conference in Los Angeles.

Sought out for his knowledge on healthcare reform and The Affordable Care Act, Bertaut has participated in more than 400 public discussions on Healthcare Costs and the Impact of Healthcare Reform with stakeholder groups ranging from healthcare policy makers in Washington, D.C., to chambers of commerce and local public service clubs.

He earned his M.B.A. and B.A. from Louisiana State University and just celebrated his 30th year as a cancer survivor.



Kerry B. Drake
Regional President, Louisiana
BancorpSouth Insurance Services/Wright & Percy

Kerry B. Drake has over 35 years of experience in the insurance industry. Drake joined BancorpSouth Insurance Services/Wright & Percy in 1994 with the responsibility of building a robust employee benefits department from the ground up. In 2008, Drake moved on from his position as Senior Vice President to Regional President of BancorpSouth Insurance Services/Wright & Percy.

As Regional President, Drake is responsible for maintaining agency operations across BancorpSouth Insurance Service's five Louisiana offices. He also continues to service a diverse range of clients in the employee benefits sector, an area in which he holds specialized knowledge.

Drake earned a bachelor's degree from Louisiana State University. He is a member of Rotary Club of Baton Rouge and the St. Aloysius Worship Commission. He and his family reside in Baton Rouge, LA.
