

BUSINESS PLANNING FORUM

ORGANIZATIONAL HEALTH

BUILDING YOUR GAME PLAN

THURSDAY,
November 6, 2014

Managing Your Organizational Health: Game-Day Strategies for Long-Term Success

AGENDA

BREAKFAST + REGISTRATION

7:30 — 8:00 am

KEYNOTE

8:00 — 9:30 am

PROGRAM

9:30 am — 12:00 pm

PANEL + BOX LUNCH

12:00 — 1:00 pm

LOCATION:

Polsinelli

900 W. 48th Place

Kansas City, MO 64112

FOR MORE INFORMATION:

Call Kristalynn Redstone
with Sound Stewardship at
913.317.6000.

- **Keynote: Pursuit of Organizational Health**
BRAD HAYNES, *PRINCIPAL CONSULTANT* | THE TABLE GROUP
- **What's New with Wellness? Plan Design, ROI and Compliance**
BRIAN JOHNSTON, *SHAREHOLDER* | POLSINELLI
JAMES CLAY, *PRESIDENT* | THE MILLER GROUP
- **The Game Plan for Financial Health**
TROY REDSTONE, *AIF, PLAN ARCHITECT* | PHD. RETIREMENT CONSULTING
MATT SYVERSON, *PRINCIPAL AND CERTIFIED FINANCIAL PLANNER* | SOUND STEWARDSHIP
- **The Reinforcement of Organizational Structure**
GREG OWENS, *MANAGING MEMBER* | KELLER & OWENS
- **The Case for Organizational Health: The Miller Group's Experience**
PAT MURPHY, *PRESIDENT* | THE MILLER GROUP
JAMES CLAY, *PRESIDENT* | THE MILLER GROUP

Business Planning Forum — **Managing Your Organizational Health:** Game-Day Strategies for Long-Term Success

AGENDA

PURSUIT OF ORGANIZATIONAL HEALTH

KEYNOTE PRESENTER: BRAD HAYNES

Organizational health is about making a company function effectively by building a cohesive leadership team, establishing real clarity among those leaders, communicating that clarity to everyone within the organization and putting in place just enough structure to reinforce that clarity going forward. Join Brad Haynes, Consultant for The Table Group, as he shares his experience working with companies across the country who are in pursuit of organizational health – and grabbing a competitive advantage that shows in the bottom line.

- Learn why Smart and Healthy Attributes are Keys to Success
- Discover the Four Disciplines of Organizational Health
- Understand the Five Behaviors of Cohesive Teams
- Learn tools that bring Clarity and Alignment to your Employees



BRAD HAYNES | Principal Consultant | The Table Group

KEYNOTE: “PURSUIT OF ORGANIZATIONAL HEALTH”

As a Principal Consultant, Brad spends most of his time working with CEO’s and other executive leaders to help them maximize their effectiveness. Whether he is leading a 2-day offsite with a leadership team, speaking to a group of managers, or individually coaching leaders, Brad’s enthusiasm and commitment to results are evident. The combination of The Table Group content and Brad’s passion for organizational health results in an effective yet enjoyable experience.

Currently, Brad works regularly with CEOs and executive teams in quickly and effectively applying the concepts captured in all of Pat Lencioni’s books. His clients span a broad spectrum of various industries, including manufacturing, financial services, technology, construction and healthcare.

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ABOUT OUR PANEL



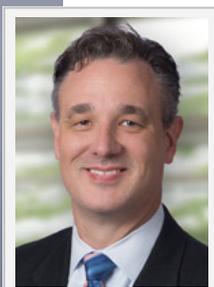
JIM CLAY | President, Employee Benefits Services and HR | The Miller Group

“WHAT’S NEW WITH WELLNESS? PLAN DESIGN, ROI AND COMPLIANCE”

“THE CASE FOR ORGANIZATIONAL HEALTH: THE MILLER GROUP’S EXPERIENCE”

Jim’s thirty-plus year experience includes designing and managing large multi-site employee benefit plans as well as owning and running previous employee benefit organizations. His success and reputation as a benefit and healthcare expert is based on a passion for linking client business goals to results-oriented solutions. Joining The Miller Group in 2012, Jim brings a wealth of healthcare reform knowledge and advanced benefit and financial modeling tools that result in long-term, bottom-line success for his clients.

Jim is a frequent guest speaker on both healthcare reform and employee benefits, and is active in a number of Kansas City civic organizations, serving as the President of Mercury Club, a member of the YMCA Legacy Board and a member of the Advisory Council for the Salvation Army. A Sigma Chi from the University of Missouri, Jim graduated in 1981 with a Bachelor of Arts degree in English Literature/Creative Writing with a double minor in History and Finance.



BRIAN M. JOHNSTON | Shareholder | Polsinelli

“WHAT’S NEW WITH WELLNESS? PLAN DESIGN, ROI AND COMPLIANCE”

Brian leads the Employee Benefits and Executive Compensation practice group. With 20 years of representing public and private businesses, as well as governmental and not-for-profit entities, Mr. Johnston assists clients with the design, implementation and administration of retirement plans, as well as non-qualified plans and other deferred compensation alternatives. Mr. Johnston also has unique knowledge and experience with the design, implementation and administration of health and welfare plans, including self-funded and fully insured health benefit plans, health savings accounts and other "consumer driven health plans," cafeteria plans, and other medical reimbursement arrangements. In each of these areas, Mr. Johnston advises clients concerning fiduciary responsibilities in compliance with legal and regulatory requirements applicable to employee benefit plans.



PAT MURPHY | President, Property and Casualty Division | The Miller Group

“THE CASE FOR ORGANIZATIONAL HEALTH: THE MILLER GROUP’S EXPERIENCE”

Pat’s insurance career spans 16 years, beginning with sales positions at CNA Insurance and Thomas McGee, L.C., where he developed his expertise in commercial insurance products and services as well as honing his account management experience. He is a principal of the firm and was promoted to president of the Commercial Insurance Division in January 2014.

One industry area of focus for Pat is the nonprofit sector. He is a frequent guest speaker and presenter at a number of nonprofit association conferences, sharing his knowledge of risk management in the not-for-profit environment. Pat is an active volunteer in a number of nonprofit organizations as well, including chairing fund-raising events for Higher M-Pact (serving high-risk youth) and United Cerebral Palsy of Greater Kansas City. He serves as a board member for Friends of the Kansas City Zoo.

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GREG OWENS | Managing Member | Keller & Owens

“THE REINFORCEMENT OF ORGANIZATIONAL STRUCTURE”

Greg has thirty years of experience in public accounting, including over twenty years as an owner of Keller & Owens. Currently, Greg is managing partner of Keller & Owens, LLC. His responsibilities include firm management, personnel management, marketing and oversight of the firm's accounting, consulting, payroll and tax services. Greg is also the account administrator for many of the firm's most significant for-profit and not-for-profits clients. Greg holds a Bachelor of Arts Degree in Accounting and Business Administration - MidAmerica Nazarene University and a Masters of Business Administration - University of Missouri at Kansas City.



TROY REDSTONE | Plan Architect | PHD. Retirement Consulting

“THE GAME PLAN FOR FINANCIAL HEALTH”

Troy is an author, featured speaker, and retirement plan consultant. He helps employees retire on their own terms and he helps employers build a Health & Wellness System for their company retirement plans to keep them out of trouble with the IRS and DOL. Mr. Redstone holds degrees in Behavioral Psychology and a Masters in Finance. He serves on the board of the Employee Benefits Institute and was recently named to the Retirement Advisor Council as one of the 75 leaders in the retirement plan industry.



MATT SYVERSON | Principal and Certified Financial Planner | Sound Stewardship

“THE GAME PLAN FOR FINANCIAL HEALTH”

Matt has a passion for delivering value beyond the numbers. As owner and senior financial advisor at Sound Stewardship, he has created a holistic planning process that is transparent, objective, and ultimately focused on the needs of the business owner, individual or family. Matt is a Certified Financial Planner®, a Chartered Advisor in Philanthropy® and holds a Bachelor of Science (Hons. Psychology), from the University of Iowa. He sits on the board for the Mid-America Planned Giving Council, is treasurer for New Horizon Ranch, and is a Qualified Kingdom Advisor.



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