

SESSION

May 17, 2018

11:30am – 1:00pm

Harris CPAs

805 W Idaho Street, 4th Floor

Boise ID 83702

Please note new time and location



President: Kelly Belden, Empower Retirement
 Program Chair: Bret Linton, Milliman
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Healthcare Accounts 101: HSAs, Idaho MSAs & What You Need to Know

Adam Berry, Healthcare Accounts Officer - Idaho Independent Bank

In this session, Adam will compare & contrast the unique healthcare account options available to employer groups and individuals across the State of Idaho. Come learn the different ways to utilize these accounts to the benefit of your clients, employees, or yourself personally.

Registration for the event closes on May 14, 2018

Register at www.wpbchoise.org

About Our Speaker:

For the past decade, Adam Berry has been working in the consumer-driven healthcare marketplace for a national Health Savings Account (HSA) administrator focusing on marketing, educational outreach and employer implementation. In December of 2017, he joined Idaho Independent Bank (IIB) to head a unique and specialized division dedicated to providing access, awareness, customer service & compliance support to employer groups and individual Idahoans across the State. With the formation of this division, both Adam and IIB have made a strong commitment to become the flagship institution for healthcare account administration within the local community banking demographic, and are excited to present this information to the professionals in attendance here today.

Married with three young children, Adam has a deep and passionate commitment to the families and businesses he encounters. He understands healthcare is a significant strain on the corporate and family budget alike, and works tirelessly to provide these entities the information they need to make an educated decision to help them save money on their healthcare costs.

You may also mail this registration form and payment to Patricia Schirmer, WP&BC, 2289 S Bonito Way, Meridian, ID 83642

Members Attending: _____ @ \$25 per person*
 Non-Members Attending: _____ @ \$45 per person*

Name(s): _____

Company/Organization: _____

Email : _____ Phone: _____

Lunch will be served.

*All cancellations must be received at least 3 days prior to the event. If a cancellation is timely received, the attendee will receive a refund, less a \$10 processing fee. If a cancellation is received less than 3 days prior, the attendee will not receive any refund.