



WAKE FOREST
UNIVERSITY

SCHOOL of PROFESSIONAL STUDIES

Board Certification in Employer Sponsored Health Plans

With the passage of the Consolidated Appropriations Act in December 2020, the Fiduciary standard for Plan Sponsors and those who support them has been taken to a new level. This program has been specifically developed to provide participants with the knowledge and tools to understand their responsibilities, and to provide a framework to establish a robust Fiduciary process for group health plans.

Date: December 7 - 9, 2021

Location: Charlotte, NC - Wake Forest University Charlotte Center

Tuition: \$3,900

AGENDA:

DAY 1:

8:30am - 5pm

Introductions & Workshop - What it Means to be A Fiduciary

On day one you'll learn about the new academic and scientific research that is being applied to the subject of fiduciary responsibility. We'll cover the history of CBCF, Psychometric Instruments, Neuro-fiduciary, Behavioral Governance and FiduciaryMetrics.

DAY 2:

8:30am - 5pm

State of the Health Care Industry Applied Fiduciary Practice

Using day1 as a foundation, day 2 will teach you how to apply the Fiduciary process using data to comply with the Fiduciary standards in healthcare.

DAY 3:

8:30am - 12:30pm

Practice Lab

Learn practical application of the Fiduciary standards by walking through the process with a mock client. Guided by case studies and real-world examples, learn how these standards are properly applied.

FACULTY:



Dr. Sean Hannah



Dr. John Sumanth



Jamie Greenleaf



Hugh O'Toole



Keith Loveland, JD



Don Trone

For more information, or to start your registration process, contact:
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PROGRAM DETAILS

Included with the course, each participant will receive:

- Course materials for the Executive Education Certificate in *Fiduciary Studies and Behavioral Governance*
- Course materials for the Executive Education Certificate in *Applied Fiduciary Practices*
- A coach to assist you with the creation of your Developmental Plan and Dossier
- A self-assessment and Group-assessment Instruments
- Access to the Augmented Learning Center powered by Notion
- Breakfast and lunch each training day

Note: *In order to complete the requirements for the BCF™ mark, each candidate also will have to complete prescribed self-study requirements. Total time commitment of both self-study and classroom training is between 50 - 75 hours, depending on your education, industry training, and experience.*

PROGRAM LOGISTICS

Location: Wake Forest Charlotte Center, 200 North College Street. Charlotte, NC

Business attire recommended

Accommodations:: See attached Hotel Information

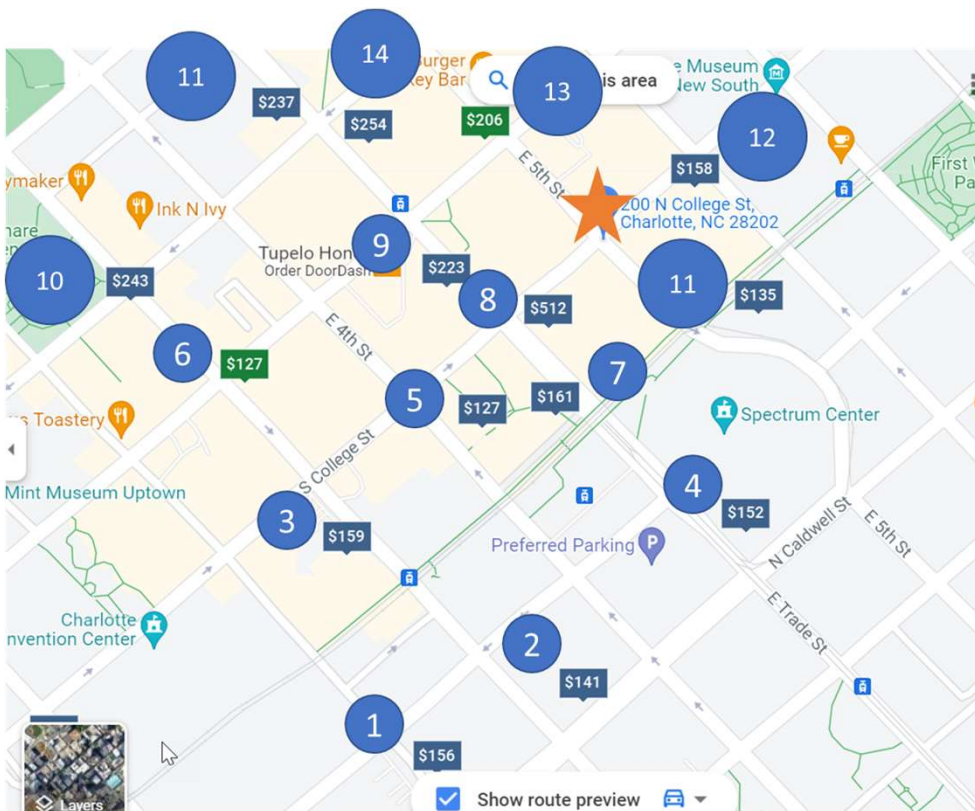
Covid: In the event that we're not able to conduct live classroom training, we will provide a different training schedule for virtual workshops.



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ACCOMMODATIONS INFORMATION



1. Embassy Suites
2. Hyatt Place
3. Hilton Charlotte Uptown
4. Hyatt House
5. Aloft
6. Courtyard
7. Residence Inn
8. Ritz
9. Omni
10. Kimpton
11. Grand Bohemian
12. Holiday Inn
13. Ivey Hotel
14. Marriott



Wake Forest Charlotte Center

We would suggest using Booking.com or similar travel app to find the best prices. We're not securing a block of rooms because at our number we won't have enough to negotiate a discount - plus there are still too many uncertainties associated with travel.

Cars: The training center is only 7 miles from the airport, so there really isn't a need for a car.