

Professional Bio's for Benefest 2008

Mergers & Acquisitions (pending 1 MA CE approval)

Presenter: Dongsup Samuel Kim Sam Kim concentrates his practice in representing a wide range of private and public corporate clients, including a wide range of internet-based companies, computer hardware and software companies, medical and optical device companies and other technology-based companies. He has extensive experience in domestic and international mergers and acquisitions of all sizes, industries and complexities, technology licensing, "angel" and venture capital financing and secured and unsecured lending. Before joining [Gesmer Updegrove LLP](#) where he is a partner, Mr. Kim was associated with Bingham Dana LLP in Boston where he represented institutional lenders in bank financings. Prior to Bingham Dana, Mr. Kim served as a Lieutenant in the United States Navy during the Persian Gulf conflict. Mr. Kim received his law degree from Cornell Law School and his undergraduate degree from the University of Kansas.

[Gesmer Updegrove LLP](#) is a Boston-based law firm that specializes in representing technology clients. Our clients are individual entrepreneurs, private and public companies, venture capitalists and major educational non-profit institutions. We meet the evolving needs of our clients by bringing our extensive experience in representing companies engaged in cutting-edge areas of business, including software technologies, the Internet, electronic commerce and medical technologies. Ninety-five percent of our practice is in the technology sector and our firm represents one of the largest technology practice groups in New England. At the same time, we bring the focus and attention of a smaller firm to the representation of our clients.

Selected Publications, Speeches, Awards and Leadership Positions:

Current Chairman of the Board, and 2006 President, of [The National Association of Asian American Professionals - Boston](#).

June 25, 2008 - Moderator and panelist at an evening seminar and reception on Accessing the U.S. Market as a Foreign Business for second year in a row, as part of a week-long Executive Technology Management Program by [Boston University Global](#) and [Korea Industrial Technology Association \(KOITA\)](#) for executive officers and directors of numerous technology companies from Korea.

June 5, 2008 - Featured speaker at the [Boston Society of Architects' Alien Architects Roundtable](#) on issues related to establishing a practice in Massachusetts by foreign architects and architectural firms.

March 1, 2008- Panelist at the [14th Annual National Asian Pacific American Conferences on Law and Public Policy](#), hosted by the [Asian Pacific American Law Students Association \(APALSA\)](#) at Harvard Law School and the Asian American Policy Review at the John F. Kennedy School of Government at Harvard University. Also panelist at the 9th conference.

May 2007 - Honored on the front cover of this year's publication of [Massachusetts Superlawyers - Rising Star Edition](#) by Law & Politics and Boston Magazine, which featured Sam Kim's commitment to services in his profession and his communities deeply rooted in his religious convictions and immigrant experiences.

November 2006-Featured guest on Boston Neighborhood Network Television's program, Legal Line titled "Entrepreneurship: A discussion of Asian-American entrepreneurship and networking".

August 18, 2006 - Moderator of a panel session titled, "Entrepreneurship: Taking the Leap", at the 20th Annual National Convention of The National Association of Asian American Professionals held in Seattle.

2005- Monthly columnist on business and law in The Boston Korean newspaper.

April 23, 2005 - Panelist at the National Asian Pacific American Bar Association (NAPABA) 2005 Northeast Regional Conference at the Seaport Hotel in Boston. The panel program was entitled "Strategies for Success."

April 16, 2005 - Panelist at the second session of the Entrepreneurship series of seminars organized by Monte Jade Science & Technology Association of New England at the Graduate School of Design, Harvard University.

April 28, 2004 - Recipient of Boston Bar Association's Children and Youth Outreach Project Volunteer Leadership Award.

Co-Chair of the Children and Youth Outreach Task Force of the [Boston Bar Association](#); former Planning Committee Chair of [Boston Cornell Entrepreneur Network](#); current active member, and former director and committee chair, [Asian American Lawyers Association of Massachusetts](#)

Problems that Drive Up Health Care (pending 1 MA CE approval)

Presenter: Gary Fradin, owner of Insurance Continuing Ed, teaches Continuing Education course on healthcare economics throughout the state and nation. Also, as an insurance broker, working primarily with small groups, Gary is acutely aware of healthcare options and issues found in today's insurance marketplace. Gary has authored several books available locally and on amazon.com

The Evolution of the HSA Market: It's Evolution and Technical Components (pending 1 MA CE approval)

Presenter: Mike Finger, National Broker, Education Director First Horizon, has more than 15 years of experience in the banking industry, including 6 years as Checking Deposit Product Manager for First Horizon National, the parent company of First Horizon Msaver on whose platform the HSA product is built. He has since brought his banking expertise to the consumer-driven health care arena, where he frequently speaks to groups at the professional level.

What do Your Clients/ Need to Know for Health Care and Taxation ..What's Affordability? (pending 1 MA CE approval)

Presenter: Eileen P. McAnney, Esq became the Senior Vice President and Associate General Counsel for Government Affairs for Associated Industries of Massachusetts - the state's largest nonprofit, nonpartisan association of Massachusetts' employers. With more than 7,000 members who employ nearly one out of every five workers in Massachusetts, A.I.M.'s mission is to promote the well-being of its members and the prosperity of the Commonwealth of Massachusetts by improving the economic climate, proactively advocating fair and equitable public policy, and providing relevant, reliable information and excellent services.

Tobe Gerard, CSA, CLTC, MBA, MLS

Insuring Your Golden Years

Tobe entered the insurance business in 1977 as Director of The Insurance

Library of Boston. After three years in that position, she worked for the Professional Insurance Agents of New England and its successor organization, the Massachusetts Association of Insurance Agents, for almost 20 years. Tobe's primary responsibilities included the selling of Association products and services, focusing on E&O insurance, life insurance, disability insurance, health insurance, and long-term care insurance. In 1999, she launched her own insurance agency specializing exclusively in long-term care insurance. Due to her independent insurance agency background, Tobe represents ten different insurance companies with the belief that "one size does not fit all!"

Tobe received her B.A. Degree from the State University of New York in Purchase, New York. She has a Masters Degree in Library Science from Simmons College in Boston, Massachusetts, as well as a Masters Degree in Business Administration from Suffolk University in Boston. Tobe earned the CLTC (Certified in Long Term Care) designation in 2001 and the CSA (Certified Senior Advisor) designation in 2004.

Tobe is on the faculty of The National Alliance. She serves as a member of the Board of Directors of the Massachusetts Association of Health Insurance Underwriters, as well as a member of the Board of Directors of Natick Rotary. She is also a member of the American Association for Long Term Care Insurance, the National Association of Insurance and Financial Advisors, the Senior Services Network, and is an Educational Subscriber to the Massachusetts Chapter of the National Academy of Elder Law Attorneys.

Course Content

This 1 hour session will walk you through how long term care insurance (LTCi) is being sold in the worksite today ----with the focus not on "group" LTCi but on what we refer to as "multi-life" LTCi----"individual" policies which have employer discounts and "simplified" underwriting. Get up to speed now so someone else isn't talking to your clients about this opportunity!

James Roosevelt, Jr. President and Chief Executive Officer

Mr. Roosevelt joined Tufts Health Plan in 1999 as senior vice president and general counsel and held that position until June 2005, when he became president and chief executive officer. As the general counsel, he presided over the legal department and the company's compliance, privacy and government relations functions.

Before joining Tufts Health Plan, Mr. Roosevelt was the associate commissioner for Retirement Policy for the Social Security Administration in Washington, D.C. He has also served as chief legal counsel for the Massachusetts Democratic Party and is co-chair of the Rules and By-laws Committee of the Democratic National Committee. Mr. Roosevelt spent 10 years as partner at Choate, Hall and Stewart in Boston. He is past chairman of the board of trustees for the Massachusetts Hospital Association, past president of the American Health Lawyers Association and past chairman of the board of trustees for Mount Auburn Hospital. Currently, Mr. Roosevelt serves as chairman of the board of directors for Massachusetts Association of Health Plans, and as a member of the board of directors at America's Health Insurance Plans, Emmanuel College and

the Kenneth B. Schwartz Center. He is also co-chair of the board of directors for the Tufts Health Care Institute.

Mr. Roosevelt received his J.D. from Harvard Law School and his A.B. with honors in government from Harvard College. He has also completed the Advanced Management Program at Harvard Business School.

Charles D. Baker is President and CEO of Harvard Pilgrim Health Care, Inc., one of New England's leading non-profit health plans. Founded in 1969, Harvard Pilgrim and its affiliates offer health and benefit plan solutions to one million members in Massachusetts, Maine and New Hampshire. Harvard Pilgrim also serves multi-site, multi-state employers that have a substantial number of employees in the New England region.

Under Baker's leadership, Harvard Pilgrim has finished first in the country for four years in a row on the National Committee for Quality Assurance's (NCQA) annual ranking of health plan performance on clinical effectiveness and member satisfaction, and for the third year in a row, was featured in a special issue of *U.S. News & World Report* on the nation's best health plans.

Prior to joining Harvard Pilgrim, Baker spent eight years in Massachusetts state government, where he served as Secretary of Administration and Finance and Secretary of Health and Human Services under Governors Bill Weld and Paul Cellucci. He won several awards for his work in state service, including the National Governor's Association Distinguished Service Award.

Baker received a Master's Degree in Management, concentrating in Public Administration and Finance, from Northwestern's Kellogg School and a BA in English from Harvard College.

Eric Schultz, President and CEO, Fallon Community Health Plans

Eric Schultz joined Fallon Community Health Plan as President in 1999.

During his 23-year career in health care, Schultz has consistently taken an active role in defining and implementing changes that have led to improvements and greater efficiencies in both the financing and delivery of health care. Under his vision and leadership, FCHP emerged from significant financial losses and transformed from a regional group model health plan into a statewide health care services company.

FCHP became the first HMO in Massachusetts to offer high-performance provider networks, which offer consumers access to physician and community-based hospital systems that produce higher than average clinical outcomes at lower costs. FCHP also is the nation's only health plan that operates a Program of All-inclusive Care for the Elderly (PACE). This FCHP line of business, called Summit ElderCare, provides day-to-day clinical care to frail elders, giving them the ability to live independently within their own homes and communities.

Schultz holds an MBA in Health Care Leadership from Yale University's School of Management, as well as a bachelor of science degree in biology and a bachelor of arts degree in economics from the University of Connecticut.