





The Beginning...

- Spearheaded by City of El Mirage, 4 Entities Formed AzMT 07/01/12
 - City of Apache Junction
 - City of Avondale
 - City of El Mirage
 - Town of Youngtown
- 751 Employees/1,893 Total Covered Lives
- 4 Medical Plans (BlueCross BlueShield of AZ Network)
 - EPO
 - PPO
 - 2 HDHPs
- Wellness Program



As of July 01, 2020

- Added Additional Benefits
 - Dental
 - Life
 - Vision
 - Telemedicine
 - Employee Assistance Program (EAP)
 - Voluntary Short- and Long-Term Disability



As of July 01, 2020 (continued)

- Added eight new members (City of Maricopa 01/01/17-06/30/20)
 - Buckeye Valley Fire District
 - Town of Fountain Hills
 - City of Litchfield Park
 - Town of Paradise Valley
 - Pinal County
 - Sun City Fire District
 - Town of Wickenburg
- 3,024 Employees/7,664 Total Covered Lives
- Average Rate Increase Since 07/01/14 – 1.8%
 - Enhanced Benefits



AzMT Financial Performance

Total Assets	\$12,852,626
Total Liabilities	\$3,637,906
Surplus December 2020	\$9,214,720



Gross Revenue	\$17,448,650
Claim Funds	\$14,873,031
Premiums	\$1,268,565
Claim Administration	\$802,908
General Operating Expenses	\$504,146
Surplus – June 30, 2019	\$9,554,381
Surplus – June 30, 2020	\$8,012,626
Surplus – December 31, 2020	\$9,214,720



AzMT Benefit Offerings – 2020-21

- 4 Medical/Prescription Drug Plans
 - EPO, PPO, PPO Buy-Up, HDHP
 - Flexible Spending Accounts (FSA)
 - Health Savings Accounts (HSA)
 - Blue Cross Blue Shield Network
- Telemedicine
 - Teladoc
- 2 Dental Plans
 - Basic Plan - \$2,000 Annual Max/19 Dep Age
 - Buy-Up Plan - \$4,000 Annual Max/26 Dep Age
 - Delta Dental Network
- 2 Vision Plans
 - Basic – 19 Dep Age
 - Buy-Up – 26 Dep Age
 - VSP
- Basic and Voluntary Life/AD&D
 - Securian
- Long- and Short-Term Disability (Employer or Employee Paid)
 - Mutual of Omaha
- Employee Assistance Program
 - SupportLine
- Wellness Program
 - AzMT L.I.V.E. Administered by ECA



Administrative Support

- Legal Counsel – Michael E. Hensley, Jones Skelton & Hochuli
- Actuary – Michael Schionning, Cheiron
- Pool Administrator & Broker/Consultant – Jaime Schulenberg, Gallagher

- Admin Group
 - Comprised of HR Reps from each entity
 - Handle administrative, day-to-day issues related to benefits and procedures such as enrollment, etc.
 - Work with Pool Administrator on benefit options for renewal consideration
 - Act as liaison with Trustee and entity management



Governance & Membership

- Every Entity = One Vote
- Application Process
 - Actuary Review
 - Trustee Review
 - Offer or Decline Membership
- 3-Year Term (Minimum)
 - Based on July – June (Any effective date other than July 01 requires membership term through June 30 after 48 months – i.e., a 01/01/19 entry date would result in membership through 06/30/22, or 54 months)
 - Penalties apply for early departure
 - If voluntarily leave at end of term, no re-entry for 3 years



Governance & Membership (continued)

- No Buy-In
- Surplus/Deficit Allocated from Date of Membership
 - Any surplus accumulated during membership is paid out on an established schedule for members who leave at the end of their term



Opportunities

- Seeking good growth for the future
 - Entities seeking a long term solution
 - Politically and financially stable
 - Good business partners
 - Larger population = greater stability and greater buying power



Interested in AzMT?

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Thank You!