



Goodroot

*Be Brave.  
Be Bold.*

Because Unaffordable  
Healthcare is Unacceptable.

**CULTURE BOOK 2023**

**“You all give me so much confidence that our 2023 plan will position us to accomplish our dreams.”**



## Mike Waterbury

Chief Executive Officer



I appreciate Goodroot giving me the opportunity and privilege to dedicate the 2023 Culture Book to my dad, Harrison Waterbury. As many of you know, my dad passed away in early January. I felt like it was fitting to dedicate this year's issue to him for two special reasons:

1. My dad loved our Culture Book. He would read it cover to cover and ask me questions about all of you and the businesses we create and accelerate together. As a glorified “bean counter” (accountant), he didn't fully grasp the meaning of it at first. But it served its purpose, and he was able to get to know all of you and witness the culture we created together.
2. Without my dad, Goodroot—and all the great work we are doing to reinvent healthcare—would simply not exist. He raised me and gave me all the support throughout my life to prepare for this opportunity. Secondly, and maybe something I did not realize until now, he is the driving force behind my brave and bold spirit and my unwavering drive to reach my goals and dreams. As my biggest fan, I always wanted to make him proud.

So, as I reflect on my dad's life and Goodroot's future, there are so many lessons to take away. My dad balanced his checkbook every single day. As we look at 2023 and beyond, it is critical to make sure the details of our business and key performance indicators are tracked and managed in that same way.

My dad struggled with a difficult disease, MDS (Myelodysplastic syndromes), and the healthcare system did not deliver very well for him in the end. He was blessed to have most of his care paid for by Medicare. But his experience motivates me to continue reinventing healthcare—one system at a time—so all Americans can get the care they deserve without going bankrupt. That would make my dad proud.

Finally, I want to thank all of you for your support. It has meant so much to me and my family. The relationships we have built, and the kindness and grace that is so freely given represent a culture I'm proud to know exists within our community. You all give me so much confidence that our 2023 plan will position us to accomplish our dreams.





# Paul Notarnicola

VP, Business Development



The Goodroot culture embodies the statement “Reinventing healthcare one system at a time”. Amongst our affiliate companies, as well as the Amplified Services teams, there is a focus on this mission, from the smallest to the largest tasks that are being undertaken. With that commitment comes support that welcomes both ideas that are “brave and bold”, but also an openness to question those ideas with the goal of fulfillment and the greatest possible impact. That dynamic is what leads to change versus simply maintaining the status quo.

When joining Goodroot, one of my goals was to engage with an organization that was targeting solutions where the end results provide better outcomes for not only its clients, but their members as well. It was important to be with an organization with a bigger goal in mind, going beyond its financial successes. I can definitely say that 2+ years in, it is a goal that has been fulfilled well beyond any expectations initially established. What makes it even greater is it is being accomplished with great people who work hard and have fun while doing it.

# Liz Chasse

Chief Marketing Officer



The mission of the Goodroot community, combined with our culture, drives me to work harder and come up with new and creative ideas to bring our solutions to the market. When you are surrounded by so many hard-working and passionate people all working toward a cause as important as making healthcare more affordable and accessible, you can't help but be inspired to put your best work forward. Every day I am excited to come to work and leave each day feeling like what I am doing is making a real difference—not just for the leaders and team members we support each day—but also in the lives of patients all over the US.

The culture of innovation and entrepreneurship that thrives and is fostered here has also given me the opportunity to gain new experiences and be part of something bigger. It's allowed me to grow as an individual and a professional. More importantly it has given me the freedom, tools and support I need to help my team members build expertise, utilize their incredible talents and create opportunities to learn and try new things. We don't always succeed, but we always celebrate the lessons learned, growth and our greater purpose





Goodroot | 2021

# Chad Frazier

**AVP, Business Development**

For me, being brave and bold means taking a chance to go outside the “traditional box” with the way we sell into market. At Goodroot, we’re encouraged to sell with “non-traditional box” ideas to get our solutions into the market. The people I work with every day—and those across our community—truly care about helping each other be successful. All the teams strive and work each and every day to make healthcare easier and more accessible for patients and stakeholders.

Goodroot | 2021

# Jillian Maraj

**Brand Designer**

Over the past year of working here, the Goodroot culture has pushed me to improve immensely as a designer. The fast-paced environment I work in is always requiring me to think on my feet and come up with quick solutions while still being pushed to produce top quality work. I’ve had the privilege of constantly working on new and exciting projects over the past year. Most notably the visual aspect of the Goodroot rebrand, which I am extremely excited to showcase in the layout of this year’s culture book.



Goodroot | 2022

# Markus Waite

**Chief Information Officer**

There are more than 1,000 companies exhibiting technology and innovation at this year’s annual Healthcare Information and Management Systems Society conference. There were over 9,000 attendees at last year’s HLTH conference, a group focused on health innovation and transformation. That tells me that healthcare is an industry ripe for change and innovation.

Our team at Goodroot—and the teams within our community of companies—have shown so much bravery and boldness to ignite meaningful change in healthcare. When I think of being bold, I think

about courage—about challenging the status quo and speaking up on topics that matter, even at the risk of being confronted or challenged. Being brave and bold is an extremely important aspect of the Goodroot culture. It’s what leads to innovation and new ideas and helps us on our mission to reinvent healthcare one system at a time.

Every single day we are presented with opportunities to be bold. When that happens, we seize the moment. Taking risks on an ongoing basis allows us to accomplish more as we seek to improve our healthcare system.



# Robert Louie

**EVP, Clinical Services**



I've been in managed care for almost 20 years. It can be frustrating at times working within the system and seeing all the inefficiencies and waste out there. Being part of a company that is intent on fixing the problem is refreshing. It's nice to be part of the solution instead of going along with the system just to make a buck.

Being brave and bold is a nice theme for our culture book and I believe reflects who we are as a company. If you believe in what you are doing and confident in your abilities to get you there, being

brave and bold comes naturally. It is especially true here at RemedyOne where everyone is so supportive and willing to help in any way they can. This provides an environment where you feel free to express your ideas and not be intimidated.

Being part of growing, successful company is nice, but when you have a real chance to make material changes to our healthcare system to make it better is something you can take pride in when you share with family and friends.



# Emily Reonegro

**Clinical Pharmacist**



When I reflect on the Goodroot culture one specific phrase comes to mind: Make it matter to make it happen. Goodroot and its affiliates have created a community of people who are willing to work hard to see a change in healthcare. We are at the forefront of fighting to make healthcare more affordable. We are tackling drug pricing, medical debt, the rising cost of care and health insurance.

We use our time and expertise to research the best ways to help people and create a better tomorrow. It is an absolutely incredible feeling to work with like-minded people who genuinely care about patients. I am honored to be able to work for a place that chooses to put the patient first every time. Collectively, we provide resources and pave the way for people to have a better experience with healthcare.

The culture here pushes you to go outside of your comfort zone, which often leads to rewarding wins and immeasurable growth. During my first year at RemedyOne, I was tasked with helping to launch our own Pharmacy and Therapeutics (P&T) Committee, which would provide the clinical foundation to our formulary choices and strengthen our brand in the market. At the time, I was extremely nervous. I hadn't done this before, but my team supported me, consistently reinforcing the fact that I had the right background for the job. Since launch, we have successfully completed quarterly meetings with our P&T Committee and have provided our clients with sought after expertise. I continue to feel accomplished after each of those meetings.

# Jason Peterson

## Clinical Pharmacist



I'm in the middle of my second year with RemedyOne and what a ride it has been so far. This past year has probably been the most fulfilling of my career and I look forward to topping the experience over the next several months. Being brave and bold has freed me to be bigger than my fears and expand professionally in a direction that allows me to become my best self. Over this past year, I have been able to write several articles and be a major contributor to the Humira biosimilars whitepaper, probably the most exciting project I have been involved with since joining Goodroot.

It's often been said that it is always brave to say aloud what everyone is thinking and that is exactly what we did with the Humira biosimilar whitepaper. If we are going to truly change healthcare, then we needed to provide a strong and factual take on the subject. Embracing the Goodroot culture

has enabled me to have my voice heard not only among my peers and my company, but also in the healthcare industry as a whole. I never dreamed that my thoughts would find their way onto a stage that has endless possibilities for consumption.

I read somewhere that being brave isn't the lack of fear, instead being brave is having that fear but finding your way through it. It has been so fulfilling to be brave and bold on my journey with RemedyOne while embracing the Goodroot culture. I am looking forward to another year of growth with all the great people that I call my Goodroot family.

On a personal note, it has been great catching several University of Kansas football and basketball games with my wife, Shauna, since moving back to the Kansas City area this past year. Let's hope the Jayhawks can successfully defend their basketball national championship in 2023. Rock Chalk!





Penstock | 2021

# Michael Dodge

Senior Database Administrator

It's almost been almost two years since I joined Penstock, and it's been a whirlwind. Our ongoing growth leaves little time for reflection! Every new client has brought its own set of challenges to overcome, and an opportunity to learn more, exercise old skills, and build new ones. Our culture of creative problem solving, as well as our close-knit teamwork, has kept me engaged every day. I'm proud to be part of Penstock.



Penstock | 2021

# Nichole Russ

Director, Concept Development & Selection Analytics

To me, being bold and brave as a professional means stepping up and challenging yourself even when you have doubts about your knowledge and abilities—or when you're afraid of being wrong. In the end, you will grow and learn from the experience no matter what the outcome is.

The culture at Goodroot and Penstock enables me to provide input and share ideas that make a difference. This encourages my mind to always be thinking of new ways to make improvements that will help bring us closer to our goals.



Penstock | 2021

# Adam Blankenship

Manager, Application Development

Every day I strive to bring my best. I know that what I am doing is important because without ClearBridge there would be no recovery work. It takes the water hose of data coming from the client and shapes it into puzzle pieces. And that's what I get to improve on every day. With every week a new feature is added to make someone's life easier—more automation, better reporting.

With our outreach, we want to educate providers on why something was paid in error to reduce the chances of the same error being submitted again on future claims. I'm confident that one day I'll be able to look back and believe that I had a positive effect on healthcare across the nation.

When I look at our product and say, "I worked on that," I feel a strong sense of pride that I've been here from the beginning. This development is only the start of our long-term goal to address the cost of healthcare. Ultimately, the future of healthcare is going to be driven by costs. Our efforts at Penstock—to identify and correct improper payments—are going to contribute to lowering the premiums paid by members.

# Matthew Duncan

## Senior Developer

As a software developer in the healthcare industry, being brave and bold means going beyond conventional technological approaches and embracing innovative solutions to align technology with business objectives. I'm proud to work for a company that encourages me to create tools that empower our business users to drive change in the payment integrity space.

The culture of trust that's been created empowers each of us to contribute ideas and improvements that drive positive change in healthcare.

By fostering a collaborative environment—where everyone's voice is heard and respected—we can leverage our collective expertise to make a meaningful impact and drive innovation in the industry.

The passion that everyone shows when coming to work each and every day is what makes me most proud to work with Penstock and the Goodroot team. One of the things I appreciate most about working here, is the focus on our mission to help people. It's refreshing to be part of a team that is driven by a higher purpose beyond just making a profit. It gives me a great sense of fulfillment to know that our work is making a meaningful difference in people's lives.



# Chuck LeMay

## Director, Client Management and Operations



Within our Penstock culture, we are not only innovative thinkers, but we are also innovative doers! We take on current and historical challenges within the healthcare business environment that hinder the healthcare industry from being a true benefit for everyone. We find ways to help through innovative processes.

While our work may have a less heartwarming, direct personal impact like other Goodroot affiliates, we're working to reduce and eliminate regulatory and payment integrity issues that will impact the healthcare industry over time. Watching and working with all our innovative teams, ignites the creative fire in our everyday processes to continue identifying new and better ways to make an impact on the healthcare industry.

At Penstock, being "brave and bold" means taking any challenge head on with confidence and courage, regardless of the type of challenge. It means changing your approach and trying something new. This culture allows me to apply my knowledge in new areas, but also challenges me to identify new ways to resolve old issues—things are always changing! Being bold and brave can be scary, anything new will be, but you never learn if you just repeat the same things over and over. Change is good!



# Preston Parrish

## Senior Manager, Underwriting & Analytics

I think most people would agree that the healthcare landscape in the U.S. is, in many ways, flawed at best. Years of misplaced priorities, driven by greedy companies and their executives, DC lobbying, and legislative capitulation have resulted in a system that is more interested in making a buck than providing quality healthcare at costs that most Americans can afford. The current state of our healthcare system didn't happen overnight, and the process of correcting it won't either. Going against the grain and upending the 'status quo' of the current healthcare system requires boldness and bravery.

At CoeoRx, and Goodroot as a whole, we are dedicated to pushing the envelope of what quality and affordable healthcare means, and who can access it. The journey isn't simple. Many who are taking advantage of the way healthcare is set up today are dedicated to discounting the fact that there is a better way, and finding it is actually

possible. The willingness we have to go our own way and pave a new path towards truly reinventing healthcare is a clear hallmark of what it means to be both brave and bold.

Having worked in, and being exposed to, many aspects of the pharmaceutical industry, I can truly say that what we are doing here is different. Since I began my career at Goodroot, I have witnessed countless members of our team drive home the idea that our clients come first. It's a cliché notion that's been stated over and over throughout the healthcare industry but seeing a client-centric mentality actually being utilized on a daily basis truly sets us apart from other companies in our space. Our level of growth and retention are a testament to this.



# Beverly McGarty

## Strategic Account Executive

In early 2022, I was contacted by a recruiter looking to fill a position. He told me it was this "exciting opportunity," and all the typical things recruiters say. I let him know I was not in the market for a new job but told him to email me the job description and I would see if I had any leads. Long story short, after some back-and-forth emails, I was able to get the name of the hiring company: CoeoRx, a small start-up part of the Goodroot community of companies. I pulled up the website and landed at the video of the origin story and I felt a pull—it was unexplainable. I dialed up the recruiter and took a bold stance. I said "I have one lead—it's me. I want to apply. Please set up the interview." I was comfortable where I was at. I was even planning to retire from the company where I was prior to coming to CoeoRx. I was going WAY out of my comfort zone, but I knew I wanted to be a part of the movement to change healthcare.

The brave and bold culture at CoeoRx and Goodroot is about the willingness to take on new challenges without hesitation—even if it's something you know little about. While sometimes it's easier said than done, I have learned that I must be confident in my abilities and past work experiences. After all, taking chances has enabled me to learn and grow. I should also mention that it helps to have a wildly talented group of individuals to learn from!





# Scott Wert

VP, Contracting and Strategy



Being bold and brave means not being afraid to take risks to move the company forward and closer to its goals. Goodroot provides a safe place for this type of environment, making it easier to think outside of the box or press for change you might not otherwise pursue. It's a great place to be!

At Nuwae, we're bravely and boldly committed to bringing the lowest cost for drugs to all patients. That means convincing healthcare stakeholders

to abandon the traditional drug distribution and pricing system and operate in a more egalitarian and less expensive environment. My colleagues all share the same commitment to this endeavor because we understand how broken the current system is for most payers and patients.

Goodroot has been incredibly supportive of our efforts, an acknowledgement that we're all "rowing in unison and in the same direction!"



# Nick McLaughlin

President

We've had a productive and successful 2022 at Breez because we are all so committed to our clients and committed to one another.

Our commitment to our clients starts with the way we engage with prospects in the marketplace, our messaging, our sales efforts, and our "brand." At Breez, we are friendly, down to earth, and helpful. Shawna, Kayleigh, Brianna, and Liz have been integral to bringing this brand to life, and Patrick is doing an awesome job repping our values and offerings while bringing in new clients. But that's just the beginning. Our commitment to our clients continues through implementation and the duration of our partnerships—which is where Tai comes in! Tai is doing an incredible job often juggling multiple implementation projects at the same time, while answering client requests, and ensuring the overall success of our client partnerships. Wow!



Our commitment to one another comes from the deep realization of how truly dependent we are on the skills, abilities, and hard work of the other members on the team. There is a tremendous spirit of respect and appreciation within our members. I am so proud to have each member of our team on board! Our cause of helping patients and hospitals with financial assistance is worthy. We need one another to grow our reach and the number of communities we get the privilege to serve. And we are excited by the success and growth we have experienced these last 12 months.

2023, here we come! Let's go!



# Tai Dax

Director of Client Success



To say that I work for a company that is focused on fixing our healthcare system is something I am so proud of. I enjoy being able to work with hospitals and develop their financial assistance platform that streamlines everything for them and their patients.

I just celebrated my one-year anniversary, and I am so grateful to be working for a company that truly values its employees. Joining Breez was the best decision I have ever made!

A quote that I love and live by in my personal and professional life, "if it makes you nervous – you're doing it right," captures how I feel about the brave and bold culture at Goodroot and Breez. It's about standing up for what you believe in, sharing your knowledge, speaking up, asking questions, giving feedback and knowing when the timing is right.

# Dylan Kalas

Sales Executive



Being “brave and bold” professionally is about attacking problems from a new angle and not being afraid of failure. We must be “brave and bold” in our actions to ultimately drive the company forward. Anything less, and we will fail. And failure comes when we stay comfortable, so be “brave and bold” and attack the problem.

I’m so proud to work for Breez because I know our service is helping patients in difficult circumstances. Our service is helping hospitals better manage their workload. It’s not a joke, it’s real – our mission is real. Being surrounded by talented driven individuals who are all striving to better this company, Goodroot, and the healthcare industry, makes me so proud.



# Patrick Whisennand

Senior Account Executive



I’m proud to work for a company that is dedicated to improving the healthcare industry and making a positive impact on people’s lives. Our focus on innovation allows us to consistently push boundaries of what’s possible in healthcare, which is not just exciting but also inspiring. As a team we’re working together to improve healthcare one system at a time, but we’re also building successful businesses. We’re community builders, educators, idea incubators, and we really really like what we do. I’m supported by my colleagues and leadership team. I’m allowed to be me—weird, silly, exhausting, but still loved. Overall, I’m proud to work with a company that is making a positive difference, not just for others, but my own.

mindset and embracing change. We have a culture of continuous learning and development, being better than who we were yesterday. We are always looking for ways to improve and advance forward. Our leadership sets the tone and provides the tools, technology, resources, and support necessary to pursue our concepts and foster an environment where employees feel empowered to take risks, share their ideas, and work to develop and implement pioneering solutions that positively impact the healthcare industry and its community.

You must be courageous and confident to help drive positive change and make a meaningful impact in the healthcare industry. Breez—and the larger Goodroot culture—encourages a growth

I work with a team that values innovation, collaboration, and excellence, and I am constantly encouraged to be “Brave and Bold” in my approach to sales, client engagement, and overall life. It means having the confidence to take risks, the courage to challenge that status quo, and being unafraid to speak up, even if it may be unpopular or contrary to prevailing wisdom.

# Steve Palma

## President

I feel incredibly thankful and privileged to have taken on the leadership of Sola in late 2022. The Sola team is laser focused on providing employers and their employees with:

1. Better healthcare benefits
2. Lower costs
3. A superior client and member experience

Think about how big those three objectives are, in a healthcare industry that is arguably declining more and more every year in all three categories.

Meanwhile, most healthcare consumers seem to have basically grown to accept that nothing will get better while the powerful forces within the payer, provider, and investor communities make massive amounts of money by maintaining the dysfunctional status quo.



So, can we do it? Yup, and we will. Sola is going to be a massive success due to the commitment of Goodroot as an organization and through the support of all of you—a bunch of smart, hard-working, hard-charging people focused on reinventing healthcare.

2023—Let's Go!



# Adam Zebian

## Director, Benefit Solutions



Being brave and bold means going against the grain and doing things even when someone says it can't be done. At Sola and Goodroot, we are open to new ideas that break the status quo to make healthcare better. We're not afraid to be different, go with our guts, push limits, and speak our minds to solve a problem.

The environment here, which pushes people to go outside their comfort zones, allowed me to take Goodroot from a fully insured health plan to self-funded. It was a very small window, but my gut told me I could get it done—and it was a huge win for the company and our team. Better benefits with little to no out-of-pocket costs to our employees. I'm proud of being part of that solution.

# DJ Denton

## Vice President, Operations Integration



It is my hope that accessing care in the U.S. health system becomes a less complicated, more transparent and affordable experience for providers and patients. Fundamentally, the act of receiving healthcare immediately emphasizes the two areas in people's lives that we care about most: our health and our money. This situation is often wrought with stress. And most unfortunately, we have to look really hard to find examples during the past decade where improvements in the health system have delivered meaningful relief.

Our Medicare & Medicaid programs serve critical roles in the healthcare landscape. We understand they will always have challenges, from funding and cost to access and scope. These programs are meant to be fluid and evolving yet given their size and governance they'll change slowly.

It's the dynamic nature of employer-sponsored benefits that offers so much opportunity. At Sola Health, we recognize that healthcare administration will always be part of the care delivery process.

But it should never be an expensive and burdensome component, which it has become. It should rarely be talked about, operating with fierce efficiency in the background, reliable and cost effective.

Sola is developing commercial benefit plans that are hyper focused on affordability and the member experience. Whether building our own solutions or working with likeminded partners, we see a path where technology can be leveraged yet the one-on-one human interaction will always remain. Sola will be a trusted resource for our customers. Small to midsize employers deserve access to less costly benefit plans that large companies enjoy. Their employees demand benefits with little or no out-of-pocket costs and a low-stress experience. They all want honest customer service when needing help understanding their benefits, locating a provider or assistance with medical bills. This is what we're creating at Sola and being brave and bold is our only option.



# Derek Fitteron

President

Time flies when you are having fun and changing Healthcare for the better. At this time last year (February), Emry was just an idea. Over the last year, based on the teamwork and assistance of the Goodroot and Medical Cost Advocate teams, we have built Emry operations, hired our first employee, implemented customized technologies and sold our first five client engagements.

This year, our goals are just as aggressive. We will significantly build our Emry team to deliver on the promise of helping clients better navigate healthcare through ongoing engagement. We also plan to leverage the new business development team of Michelle Frank, Adam Soffe and Garrett Mineau. Finally, we will support the growth of Sola by enabling Sola Navigation, powered by Emry. At Emry, we endeavor to deliver and live by the capabilities competitors just speak about including: engaging employees, reducing their cost and helping them manage and reduce medical debt before it happens. We have already had the pleasure of assisting many Goodroot employees and have made large impacts to the cost of their care.



It sometimes seems paradoxical that U.S. healthcare, which is the largest business in the largest world economy, can be changed by small, brave and bold companies; but that is “home” for niche seekers and exploiters like our Goodroot companies. In our case, a focused team of driven experts can do things better, faster and more efficiently than an insurance giant, throwing untargeted resources at the challenge. There is nothing I love more than seeing a team come together with a unique shared goal and start succeeding.

What attracted me to Goodroot is the opportunity to work with a team of experienced professionals driven by the promise and passion of changing healthcare. Over the last year, I have seen “LFG” rally cry in action. I have had the pleasure of meeting and working with the members of the Goodroot leadership team who are all driven by the free and amplify mantra and we have had a great time in the process. A small example was the first annual meeting of the Florida Polar Bear Club who braved the cold waters of the Atlantic in December under the full moon on Amelia Island. No names, but you know if you were there.

On a personal note, I grew up in Connecticut so visiting Goodroot is like coming home again. I now live in northern New Jersey, about 2.5 hours from Collinsville, with my wife, Donna, and my son, Brennan in high school. My daughter, Dara, is currently attending Lehigh University as a senior. I enjoy spending time with my family and trying to keep up with my son outdoors including traveling abroad, skiing, hiking, fishing, golf, etc. I am a lifelong audiophile, with interests in many music styles.



# Meena Sahibdin

CareCost Guide



At Emry and Goodroot, being brave and bold means stepping outside of your comfort zone and facing challenges head on. The insurance world feels so rigged and many individuals and their loved ones suffer from that financially, while the insurance companies just cash in. The financial stress and burden and even just the lack of fully understanding benefits leave a lot of individuals feeling helpless. Goodroot is putting a dent in that unhealthy culture. For me, Goodroot's mission is to heal a broken system instead of slapping a tiny band-aid on an open fracture. The idea of wanting to make a difference, and make that difference, is quite a challenging and a monumental task. Goodroot is basically 'challenge accepted'.

Taking on the role of the first Emry CareCost Guide was me stepping outside of my comfort zone on so many levels. I walked away a stable role and took a leap of faith to be part of this new company. As the first employee—with a title I had never heard of—I stepped into ground zero, becoming part of the Emry build. It was so new on every level but still something that was so needed. To be part of something bigger than what I originally understood made me so happy that I joined. My frustrations of always wanting to help people that needed help and not being able to do so in my previous environment made this leap worth it on all levels.

