WEDNESDAY, OCT. 2, 2019

8:00 a.m.  Registration and Breakfast

8:40 a.m.  Welcome
Eden Perry, Head of U.S. Public Finance, S&P Global Ratings

Opening Remarks
Douglas L. Peterson, President and CEO, S&P Global

Event Emcee: Ken Gacka, Senior Director & Analytical Manager, U.S. Not-for-Profit Health Care, S&P Global Ratings

9:00 a.m.  Health Care Economics and Health Policy Debate
The future of the $3.65 trillion U.S. health care system is among the most widely debated topics as we near an important election, particularly as its growth isn’t about to slow down. In this session, we will discuss the current state of health care and the potential implications of the key policy proposals, such as Medicare for All and the Public Option. We will compare the U.S. to other countries that successfully implemented universal coverage, and discuss certain policy innovations that states, such as California, have undertaken in recent years.

Moderator: David Peknay, Director & Lead Analyst, U.S. Corporate Health Care, S&P Global Ratings
Beth Ann Bovino, U.S. Chief Economist, S&P Global Ratings
Anna Levchuk, Health Care Industry Head, S&P Global Market Intelligence
Gabe Petek, Legislative Analyst, California Legislative Analyst’s Office

10:00 a.m.  Networking Coffee Break

10:30 a.m.  CEO Strategic Perspectives
Environment, Strategy, Trends, and Expectations
Senior executives discuss their strategies and key operational issues, both near-and long-term, as they guide their organizations through a turbulent atmosphere. Our annual round robin dialogue returns, with key executives from the three sectors discussing what’s at the heart of the health care delivery system.

Moderator: Martin Arrick, Managing Director, U.S. Public Finance Ratings, S&P Global Ratings
Rod Hochman, MD., President & CEO, Providence St. Joseph Health
Michael Neidorff, Chairman, President & CEO, Centene Corporation
Ron Rittenmeyer, Executive Chairman & CEO, Tenet Healthcare Corporation
11:30 a.m. **House View: Analyzing a Fragmented Health Care Industry**
Senior analysts from across S&P Global Ratings come together to provide an integrated credit view on U.S. health care. The discussion will include our credit opinions on all health care intermediaries — from providers to insurers to PBMs, and everyone in between. The expert panelists will also provide our credit opinions around key policies and regulations that are affecting the sector today.

**Moderator:** Deep Banerjee, Director & Lead Analyst, U.S. Health and Life Insurance Ratings, S&P Global Ratings

**Suzie Desai,** Director & Lead Analyst, U.S. Not-For-Profit Health Care, S&P Global Ratings

**David Kaplan,** Director, U.S. Corporate Health Care Ratings, S&P Global Ratings

**James Sung,** Associate Director, U.S. Health & Life Insurance, S&P Global Ratings

12:20 p.m. **Luncheon Presentation**

**The Future of Health Care**
Lunch will be served beginning at 12:20 p.m. Our presentation will begin at 12:45 p.m.

**Donato Tramuto,** Chief Executive Officer, Tivity Health

1:30 p.m. **Can Pharma Still Keep the Pot From Boiling Over?**
Headlines about pharma industry legislation abound. But with net drug-price increases approaching zero (or even turning negative), what can the industry do to further lower the temperature in Washington? Is the industry running out of moves?

**Moderator: Shannan Murphy,** Senior Director & Analytical Manager, U.S. Corporate Healthcare, S&P Global Ratings

**Kyle Roland,** Director – Investment Grade Health Care, Wells Fargo

**Heather Wall,** Chief Commercial Officer, Civica Rx

**Arthur Wong,** Director, U.S. Corporate Health Care, S&P Global Ratings

2:30 p.m. **Closing Remarks**

**Informal Roundtable Discussions**