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JACQUE J. SOKOLOV, M.D.

Abbreviated Biography and Curriculum Vitae

October 8, 2020

Jacque J. Sokolov, M.D. is chairman and chief executive officer of the SSB, a diversified U.S. based healthcare management, development and investment company. Its four strategic businesses include SSB Solutions, SSB Investment Funds, SSB Financial Services and SSB Governmental Services.

As CEO, Dr. Sokolov leads SSB's four strategic business units to optimize healthcare solutions, investment strategies, financial structures and governmental contracting. SSB was founded on a premise to develop high quality, value-based solutions in rapidly evolving markets. The company operates across the United States and has worked with more than 100 healthcare companies in virtually every healthcare sector.

Dr. Sokolov and the SSB teams have been vital to large healthcare corporations to reimagine their business models and improve and increase performance at critical inflection points in their history. Some of his projects include redesigning large health plans such as the Humana Inc. turnaround in 2000, the transition of Hospira from an I.V. solution company to the largest independent biosimilar manufacturer in the world that Pfizer acquired for \$17 billion in 2015. In addition, Dr. Sokolov remains active in the development of physician practice management companies such as the Summit Medical Group and CityMD transaction by Warburg Pincus in 2019. The firm continues to be involved in advanced digital health companies such as GlobalMed and next-generation Immuno-Signature/Immuno-Therapy companies such as Calviri.

Upon starting his career, Dr. Sokolov served as Vice President of Healthcare and Chief Medical Officer for Southern California Edison where he restructured one of the largest self-funded, self-administered corporate ERISA plans in the US. The restructured "SCE Health Plan" is similar to the health-care venture between Amazon, J.P. Morgan and Berkshire Hathaway called HAVEN. Dr. Sokolov's plan cut spending by \$100 million and improved healthcare quality for SCE employees/retirees.

He currently serves on multiple public, private and not-for-profit healthcare boards.

Dr. Sokolov received his BA and MD Degrees from the University of Southern California and completed his internal medicine residency at the Mayo Graduate School of Medicine followed by his fellowship in cardiovascular diseases/nuclear cardiology from the University of Texas-Southwestern Medical School.

GOVERNANCE/BOARD OF DIRECTORS EXPERIENCE

National Association of Corporate Directors (NACD)

Member – Board of Directors Pacific Southwest Chapter
Leadership Fellow and Ambassador

2010–Present

PUBLIC COMPANIES

MedCath Corporation (NASDAQ: MDTH) Chairman – Compliance/Quality Committee Member – Compliance/Quality Committee	2004–Present
Hospira (NYSE: HSP) Founding Director Chairman – Science, Technology and Quality Committee Member – Audit & Public Policy Committee; Nominations and Compensation Committee; Science, Technology and Quality	2004–2015
Coastal Physician Group/PhyAmerica Corporation (NYSE: ERDR) Chairman – Board of Directors; Executive Committee Member – Audit Committee; Compensation Committee	1994–1997

PRIVATE COMPANIES

Equality Health Board of Directors	2020–Present
University PharmCo, LLC Managing Member/Board of Managers	2019–Present
Trill Project, Inc. Board of Directors	2018–Present
AKOS, LLC/Apricus Chairman – Patient Care and Quality Committee Board of Managers	2018–Present
Veterans Accountable Care Group, LLC Chairman – Board of Managers	2016–Present
Calviri, Inc. Member – Board of Directors	2016–Present
GlobalMed, LLC Chairman – Board of Managers	2015–Present
SSB Solutions, Inc. and SSB Subsidiaries Chairman – Board of Directors Member – Compensation; Audit; Quality/Compliance Subsidiaries – Healthcare Community Development Group, LLC (HCDG) A National Certified Development Enterprise (CDE)	1997–Present
NeuLife Neurological Services, LLC (NeuLife) Chairman – Quality Committee Member – Board of Managers	2015–2019

Zoonie, LLC (SMG)/Summit Holding Company 2013–2019
Chairman – Compensation Committee
Member – Board of Mangers

MyHealthDirect, Inc. 2012–2019
Member – Board of Directors; Special Committee of Independent Directors

ADVISORY BOARD/INVESTMENT PARTICIPATION

Equality Health 2018–Present
Population Specific Healthcare Delivery System
Board Advisor

Universal Health Coin, Inc. 2018–2020
Healthcare Blockchain – Cryptographic Currency/Token Technology
Board Advisor/Investor

Paraffin International, Inc. 2015–2020
Therapeutic Healthcare Product Development
Board Advisor/Investor

NATIONAL/REGIONAL NON PROFIT ORGANIZATIONS

The ASU New American Council for Arts and Design 2020– Present
Council Member

**The Skandalaris Center for Interdisciplinary Innovation
and Entrepreneurship – Washington University in St. Louis** 2019–Present
National Council Member

The USC School of Pharmacy Board of Councilors 2017–Present
Executive Committee Member
Management Sub Committee Chairman

The Health Futures Council at Arizona State University 2015–Present
Chairman Emeritus – Health Futures Council
Steering Committee – Member

Phoenix Children’s Hospital 2009–2019
Arizona Children’s Risk Solutions
Chairman Emeritus – Board of Directors
Chairman – Governance Committee
– Patient Care and Quality Enhancement Committee
Member – Governance, Compensation, Patient Care and
Quality Enhancement, Audit Integrity, and Finance

National Health Foundation 1990–2016
Member – Executive Committee; Audit Committee; Investment Committee

American College of Medical Quality 2009–2010
Member – Grants and Scholarship Committee

National Business Group on Health/Washington Business Group on Health 1990–2005
Member – Executive Committee; Governance/Strategic Planning Committee

ADDITIONAL BOARD OF DIRECTORS MEMBERSHIPS (PAST/PRESENT)

The White House Health Project 1990–2015
Chairman – Executive Committee of the Board (2000-2010)
Member – Board of Directors/Emeritus

National Fund for Medical Education (NFME) 1990–1998
Member – Board of Directors

California Health Decisions 1988–1994
Member – California (Consumer/Patient Advocacy Group)

PROFESSIONAL EXPERIENCE

Chairman of the Board of Managers 2016–Present
Veterans Accountable Care Group, LLC (VACG)

VACG is a veteran-owned/veteran centric strategic advisory firm / Prime Contractor for the VA CCN Procurement (Finalists for Region 1 & 4). VACG was formed specifically to provide a “Veteran Centric, Population Health Clinical Solution” in response to VA CCN initiative. The VA CCN is an \$ 80+ Billion/8year effort by the VA to develop the “Next Generation” of clinical solutions to enable optimal healthcare services for America’s veterans nationally.

Chairman & Chief Executive Officer 1997–Present
SSB

SSB is a diversified US based healthcare company with four strategic business units: 1) SSB Solutions (Management Consulting/Advisory Services - 150+ markets); 2) SSB Investments (Private Healthcare Investment Fund); 3) SSB Financial Services/Healthcare Community Development Group-HCDG (New Markets Tax Credits, Opportunity Zone Development, etc.); and SSB Governmental Services (Veteran’s Accountable Care Group-VACG etc.). SSB has a reputation for innovative out-of-the-box thinking for senior leadership of organizations making “Key Crossroads Decisions.” In addition, SSB has made significant investments in multiple types of companies that reflect unique market knowledge of synergistic opportunities that may have not been previously appreciated.

- SSB Solutions (Management Consulting/Advisory Services)

Health Plans
Humana/Emphesys
Anthem/Wellpoint
CIGNA
Blue Cross/Blue Shield (Multiple Plans)

Promedica
Partners-In-Care
Academic Medical Centers
TCMC
University of Virginia Medical Center

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Bowman Gray School of Medicine
University of Southern California
Stanford University
Harvard/Beth Israel Hospital

Corporations/Pharmaceutical/Medical
Device Companies

Lucent
Johnson & Johnson
Electric Data Systems (EDS)/HP
General Electric
GlaxoSmithKline
Merck

Banking & International

IMF
World Bank
Mellon
Health Ministry, Venezuela

Private Equity/Venture Participation

Phoenix Capital Management
KKR

Hospitals

American Hospital Association – National
VHA – National and Regional
Christus – National
Tenet – National
Dignity/Catholic Healthcare West – AZ/CA

Trinity-Catholic Healthcare East – National
Hoag Memorial Hospital Presbyterian – CA

Honor Health – AZ
Hackensack University Medical Center – NJ
Baylor Hospital – Texas
Memorial Hermann HC System – Texas
Alegent Health & RWMC – Nebraska
Virtua – NJ

Physician Organizations

American Medical Association
American Medical Group Association
Mayo Clinic – National
Cleveland Clinic – Ohio
Dean Clinic – Wisconsin
Summit Medical Group – New Jersey
Alegent Health Clinic – Nebraska
Coastal/PhyAmerica – National

Governmental

White House – Reagan/Bush/Clinton/Bush
Administrations
US Treasury – National CDE
Senate – Finance Committee
House – Ways & Means Committee
GAO – General Accounting Office
HHS/HCFA/CMS
State of CA – Dept. of Insurance/Managed
Health Care

- SSB Investment Funds

SSB Investment Funds represent wholly owned “Private/Captive Healthcare Investment Funds.” These funds have had and continue to invest in multiple Healthcare Sector assets. Investments have Governance/ Management/Advisory Roles involved. The level of investment ranges from Angel/Seed to Mature VC, PE, and later Series Investments.

* Position Liquidated

Partners in Care* – SSB Client, Investment – Physician/Hospital/SSB Network JV
– Enterprise Value Exit \$100MM

Advanced Health Plans* – SSB Subsidiary – Purchased by PhyAmerica \$30MM

Humana* – SSB Client, Investment, Options – Health Plan Redesign/Corporate Turnaround
– Humana Shareholder Enterprise Appreciation \$500MM to \$ 10 Billion over 5 years

Hospira* – Founding Director, Investment, Options– Abbott Spinoff at \$750MM – Pfizer Exit \$17B

Zoonie (SMG) – Founding Manager, Investment, Options – “Unicorn” \$1.8B Exit to Warburg

MyHealthDirect* – Manager, Investment, Options – Healthcare IT Platform/Scheduling App
– Exit at \$60MM to Experian

GlobalMed – Chairman/Founding Manager, Investment Options – Virtual Healthcare IT Platform

Calviri – Founding Manager, Investment, Options – Dx and Rx mRNA Cancer & COVID19

AKOS / Apricus– Founding Manager, Options– Physician/Digital Health Company

Universal Health Coin/Exchange – Investment – Crypto Currency/Block Chain Applications
Equality Health – Director, Investor – Highly Specialized Population Health Platform/IPA

Paraffin USA, Inc.– Investor – Paraffin Glove Advanced Cosmetic and Medical Technology
Trill Project – Director, Investor – Advanced Digital Communication Platform – Behavioral Health
VACG – Director, Investor – Prime Contractor/Owner VA CCN and Govt. Contracts
Additional Portfolio Companies

– Madora, Cognition, Tibic, Emblematic Group, Portfolia FemTech Fund, Astia Angels Kuli Kuli

- Healthcare Community Development Group, LLC (HCDG)

Healthcare Community Development Group, LLC (“HCDG”) is a national “Community Development Entity (CDE)” whose primary mission is to attract and/or provide investment capital for healthcare industry projects in low-income communities across America and improve healthcare quality. At least 60 percent of HCDG’s activities (e.g., loans, New Market Tax Credits/NMTC’s and investments) are targeted towards serving low-income communities nationwide. HCDG has now provided over \$ 100 million in NMTC’s to entities including: Martin Luther King Jr. Community Hospital, Phoenix Children’s Hospital, and Cuyuna Regional Medical Center. HCDG is currently working with the Mayo Clinic and the Rochester Regional Foundation to optimize the \$ 6.4 billion allocated for their destination medical center project in Rochester, MN.

- SSB Governmental Services

SSB Governmental Services is focused on supporting the Veterans Health Administration commitment to re-design care access and delivery, both within VHA facilities as well as community-based settings. We have organized the resources needed to manage and support the VHA's next-generation Community Care Network (CCN). As envisioned, the VA CCN will operate a quality-focused, value-driven network of providers (medical, dental, pharmacy, vision and others) with integrated coordination of care, customer service, operations and administrative systems to serve Veteran's healthcare needs. The program is planned to rollout in 2019-2020, benefiting Veterans, the community providers and the VHA.

Executive Chairman of the Board of Directors 1994–1997
PhyAmerica/Coastal Physician Group (NYSE:ERDR): “Executive Chairman”– Nation’s Largest Physician Practice Management Company – 1995 Revenues = \$ 1 Billion+ – 50,000 Medicare Risk Lives – 6,500 Physicians – 3 HMOs – 800,000 Lives – Government Services.

Chairman and Chief Executive Officer 1992–1994
Advanced Health Plans, Inc.: A private, closely held, Health Care Management/Development Company Specializing in: Physician Organizations – Provider Sponsored Health Plans/Networks – Product/Specialty Service Line Development with Facilities (e.g. Heart Hospitals, Women’s & Children’s Hospitals, ASC’s, MOB’s, etc.) – Business Plan Creation – Market Strategy & Design – Certification/Compliance Processes – Financing/Capital Acquisition – Quantitative Partnering Analysis. Acquired by Coastal Physician Group/PhyAmerica (NYSE:ERDR) for \$30 million-1994

Vice President and Chief Medical Officer 1987–1992
Southern California Edison Company/Edison International (NYSE:SCE)
(Corporate Officer Responsible for Southern California Edison Health Plans and Clinics)
Vice President, Chief Medical Officer and the Corporate Officer responsible for the SCE Self-Administered, Self-Insured Corporate Health Care System/Plan. The Southern California Edison Company Health System/Health Plan covered over 60,000 employees, retirees and dependent

beneficiaries. SCE health system/plan optimization strategies included development of “Health Flex”. “Health Flex” was a prototype of what a “next generation” integrated system/plan looks like

today. “Health Flex” integrated the financing, administration and delivery systems using multiple supply and demand side health care innovations. For the five years (1988-1992), “Health Flex” created savings exceeding \$100 million bringing health care expenditures from a projected \$580 million to less than \$470 million while improving health care quality.

JJS, Inc. / Sokolov Strategic Alliance (SSA) Founder & CEO

1984–1987

- Strategic Planning
- Organizational Development
- Financial Analysis
- Cost Accounting
- Microeconomic Analysis
- Health Plan Development
- Decision Science
- Marketing and Health Promotion
- Workers' Compensation/Disability/Rehabilitation
- Executive Health Programs

Clients included: AT&T; Southwestern Bell; Texas Instruments; Wang Laboratories; Rosewood Corporation; Kelton-Mathes Foundation; City of Dallas, Texas; Baylor Center for Health Promotion, etc.

EDUCATION

University of Texas Health Science Center at Dallas
Southwestern School of Medicine

1981–1984

Cardiovascular Disease Sub-Specialty and
NIH Sponsored Nuclear Cardiology Fellowship
James T. Willerson MD- Chairman

Mayo Graduate School of Medicine - Mayo Clinic
Internal Medicine Specialty Training Program
Edward C. Rosenow, III MD-Director

1978–1981

School of Medicine, University of Southern California
Doctor of Medicine – Robert Tranqueada MD- Dean

1974–1978

University of Southern California
Bachelor of Arts in Medicine, Phi Beta Kappa/Magna Cum Laude

1971–1974

LICENSURE, BOARD CERTIFICATION AND FINANCIAL SERVICES REGULATIONS

Diplomat, American Board of Internal Medicine
Diplomat, American Board of Quality Assurance and Utilization Review
Diplomat, National Board of Medical Examiners
Diplomat, Federation Licensing Examination (FLEX)
Medical Licenses – Arizona, California, Texas, and Minnesota
Financial Registration – SEC/Edgar Code
State of New Jersey’s Department of Banking and Insurance

SOCIETIES, CLUB MEMBERSHIPS AND AWARDS

Phi Beta Kappa; Governor's Scholar; Ephebian Society; Alpha Epsilon Delta; California Scholarship Federation; Salerni Collegium; USC Presidential Associates; Aesculapians; Yale Master's Program; Society of Medical Administrators (SOMA); Medical Administrators Conference (MAC); Doctors Mayo Society; Plummer Society; and The Koop Award from the White House Health Project for Preventive Medicine.

American College of Healthcare Executives (ACHE) – James H. Hamilton 2013 Book of the Year for “Developing Physician Leaders for Successful Clinical Integration”. Award is underwritten by the Alumni Association of the Graduate Program in Hospital and Health Care Administration of the University of Minnesota.

UNIVERSITY AFFILIATIONS, FACULTY APPOINTMENTS, ADVISORY BOARDS AND VISITING LECTURESHIPS (PAST/ PRESENT)

Arizona State University Health Futures Council – Chairman Member Emeritus Professor College	School of Medicine
Duke University Fuqua School of Business School of Medicine	University of Pennsylvania Leonard Davis Institute of Health Economics, The Wharton School Aresty Institute of Executive Education
Harvard University School of Public Health School of Business Department of Health Policy and Mgmt.	University of Southern California School of Medicine Clinical Professor of Medicine School of Business School of Pharmacy Board of Councilors
Massachusetts Institute of Technology Whitaker College of Health Sciences, Technology and Management	University of Texas, Southwestern School of Medicine Health Science Center
Northwestern University School of Medicine	University of Virginia School of Medicine
Stanford University School of Medicine	Wake Forest University Bowman Gray School of Medicine
University of California, Los Angeles School of Medicine School of Public Health and Andersen Graduate School of Mgmt.	The Governance Institute Conference Faculty Board of Advisors School of Public Administration
University of California, San Francisco Center for Health Professions	

Washington University in St. Louis
Skandalaris Center National Council

OTHER PROFESSIONAL AFFILIATIONS (PAST/ PRESENT)

National Association of Corporate Directors	Group Health Association of America
American College of Physician Executives/Leadership	Los Angeles World Affairs Council
American College of Physicians	Managed Health Care Association
American College of Medical Quality	Medical Group Management Association
American College of Healthcare Executives	National Fund for Medical Education (NFME)
American College of Occupational Medicine	National Resource Center on Worksite Health Promotion
American Geriatrics Society	National Association of Employers on Health Care Action
American Hospital Association	Nat'l Association of Managed Care Physicians
American Medical Association	National Health Policy Council
American Medical Directors Association	National Governors' Association
American Medical Political Action Committee	National Health Foundation
American Public Health Association	National Leadership Coalition for Health Care Reform
Assoc. of Univ. Programs in Health Admin.	The Royal Society of Medicine
American Management Association	Society for Ambulatory Care Professionals
American Society on Aging	Self-Insurance Institute of America, Inc.
Business Forum on Aging	Town Hall of California
The Conference Board	Washington Business Group on Health
Edison Electric Institute	
Foundation for Health Services	

ADVISORY BOARD MEMBERSHIPS (PAST/PRESENT)

National Health Policy Council; Senator Jay Rockefeller, Honorary Chair, and Steve Gleason, Chair; Des Moines, Iowa.

Garamendi Health Care Commission/State of California Department of Insurance; Commissioner John Garamendi, Chair and Walter Zelman, Chief of Staff, Los Angeles, California

National Resource Center on Worksite Health Promotion; Don Galvin, Ph.D., Acting Director; Washington, D.C.

American College of Occupational and Environmental Medicine (ACOEM) Health Care Quality & Cost Management Committee; Jeffery S. Harris, M.D., FACOEM, Chair, Arlington Heights, Illinois.

Foundation for Health Services Medical Advisory Board; Jonathan B. Weisbuch, M.D., Chair, Medical Director, Los Angeles County Department of Health Services; Los Angeles, California.

Harvard School of Public Health- Health Care Reform Project; Harvey V. Fineberg, Dean; Boston, Massachusetts.

University of California at Los Angeles- Department of Health Services Project; Stuart O. Schweitzer, Ph.D. Chair, Los Angeles, California.

University of Pennsylvania- Leonard Davis Institute of Health Economics- Corporate/Hospital Rating Project; Philadelphia, Pennsylvania.

University of Southern California, Los Angeles, California.

- M.D.- MBA Advisory Board, School of Medicine and School of Business
- Health Care Management Advisory Board, School of Pharmacy and School of Business
- Advisory Board of the Health Services Administration Program, School of Public Administration

The Wharton School of the University of Pennsylvania; Managed Care Issues for Corporate Executives, Aresty Institute of Executive Education; Robert E. Mittelstaedt, Jr., Vice Dean and Director; Philadelphia, Pennsylvania.

MDOptions.com; The Physicians' Resource for Information on the Economics of Practicing Medicine

Pacific Center for Health Policy and Ethics; University of Southern California. Alexander Morgan Capron and David A. Goldstein, M.D., Co-Directors; Los Angeles, California.

Weingart Health Partners: Maxine Johnston, Executive Director; Los Angeles, California. (Co-Founded organization of Los Angeles Area Medical Leaders for enhanced medical care to homeless and abused of skid row)

EDITORIAL BOARD MEMBERSHIPS (PAST/ PRESENT)

Journal of Managed Care Medicine (JMCM), Official Journal of the National Association of Managed Care Physicians Editorial Board. Dexter W. Shurney, MD, MBA, MPH, Editor-in-Chief. Published quarterly by Association Services, Inc., Glen Allen, Virginia.

Population Health Management Journal. David B. Nash, Editor-in-Chief. Mary Ann Liebert Publications, New Rochelle, New York.

Disease Management, Official Journal of the NMHCC Disease Management Congress Editorial Board. David B. Nash, Editor-in-Chief. Mary Ann Liebert Publications, Larchmont, New York.

The Physician Executive Editorial Review Panel. Bill Steiger, Editor, American College of Physician Executives; Tampa, Florida.

Physician Executive's Editorial Advisory Board. Wesley Curry, Editorial Director, The American College of Physician Executives; Tampa, Florida.

Journal of Health Care Benefits Advisory Board. Jeffrey D. Mamorsky and Joseph W. Duva, Co-Editors; New York, New York.

Outcomes Measurement and Management Advisory Board. Mark Zitter, Publisher, and David Strickland, Editor; San Francisco, California.

Managed Care Insights Advisory Board. Tom Marcinko, Manager, Publications; Newtown, Pennsylvania.

Health & Sciences Communications Advisory Board. Michele L. Robinson, Editor-in-Chief, *Report on Medical Guidelines & Outcomes Research*; Washington, D.C.

Direct Contracting & Hospital Managed Care Editorial Board. Allan Fine, Editor, Vice President and National Practice Director for Managed Care, Witt Associates, Inc.; Oak Brook, Illinois.

Journal of the American Medical Association (JAMA) Physician Review Board. George D. Lundberg, M.D., Editor-in-Chief, Scientific Publications; Chicago, Illinois.

Integrated Healthcare Report National Advisory Board. John D. Cochrane, Editor; Los Angeles, California.

Managing Employee Health Benefits Editorial Board. Joseph Burns, Editor-in-Chief; New York, New York. *Options*; Diabetes Practice Options Magazine; Premier Healthcare Resources Inc.

SSB 2021 Umbrella

