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## **JACQUE J. SOKOLOV, M.D.**

Abbreviated Biography and Curriculum Vitae

April 23, 2021

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

2020–Present

## **PUBLIC COMPANIES**

<b>MedCath Corporation (NASDAQ: MDTH)</b> Chairman – Compliance/Quality Committee Member – Compliance/Quality Committee	2004–2021
<b>Hospira (NYSE: HSP) Founding Director</b> Chairman – Science, Technology and Quality Committee Member – Audit & Public Policy Committee; Nominations and Compensation Committee; Science, Technology and Quality	2004–2015
<b>Coastal Physician Group/PhyAmerica Corporation (NYSE: ERDR)</b> Chairman – Board of Directors; Executive Committee Member – Audit Committee; Compensation Committee	1994–1997

## **PRIVATE COMPANIES**

<b>University PharmCo, LLC</b> Managing Member/Board of Managers	2019–Present
<b>Trill Project, Inc.</b> Board of Directors	2018–Present
<b>AKOS, LLC/Apricus</b> Chairman – Patient Care and Quality Committee Board of Managers	2018–Present
<b>Veterans Accountable Care Group, LLC</b> Chairman – Board of Managers	2016–Present
<b>Calviri, Inc.</b> Member – Board of Directors	2016–Present
<b>GlobalMed, LLC</b> Chairman – Board of Managers	2015–Present
<b>SSB Solutions, Inc. and SSB Subsidiaries</b> Chairman – Board of Directors Member – Compensation; Audit; Quality/Compliance Subsidiaries – Healthcare Community Development Group, LLC (HCDG) A National Certified Development Enterprise (CDE)	1997–Present
<b>Equality Health</b> Board of Directors	2020–2021
<b>NeuLife Neurological Services, LLC (NeuLife)</b> Chairman – Quality Committee Member – Board of Managers	2015–2019

<b>Zoonie, LLC (SMG)/Summit Holding Company</b> Chairman – Compensation Committee Member – Board of Mangers	2013–2019
<b>MyHealthDirect, Inc.</b> Member – Board of Directors; Special Committee of Independent Directors	2012–2019

#### **ADVISORY BOARD/INVESTMENT PARTICIPATION**

<b>Equality Health</b> Population Specific Healthcare Delivery System Board Advisor	2018–Present
<b>Universal Health Coin, Inc.</b> Healthcare Blockchain – Cryptographic Currency/Token Technology Board Advisor/Investor	2018–2020
<b>Paraffin International, Inc.</b> Therapeutic Healthcare Product Development Board Advisor/Investor	2015–2020

#### **NATIONAL/REGIONAL NON PROFIT ORGANIZATIONS**

<b>The ASU New American Council for Arts and Design</b> Council Member	2020– Present
<b>The Skandalaris Center for Interdisciplinary Innovation and Entrepreneurship – Washington University in St. Louis</b> National Council Member	2019–Present
<b>The USC School of Pharmacy Board of Councilors</b> Executive Committee Member Management Sub Committee Chairman	2017–Present
<b>The Health Futures Council at Arizona State University</b> Chairman Emeritus – Health Futures Council Steering Committee – Member	2015–Present
<b>Phoenix Children’s Hospital</b> <b>Arizona Children’s Risk Solutions</b> 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	2009–2019

**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 Blue Cross/Blue Shield (Multiple Plans)
  - Humana/Emphesys Blue Cross/Blue Shield of Arizona
  - Anthem/Wellpoint Partners-In-Care
  - CIGNA

Academic Medical Centers

TCMC  
University of Virginia Medical Center  
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  
Highlands Physicians, Inc.  
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 Director, 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 – Founding 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 1981–1984  
Southwestern School of Medicine  
Cardiovascular Disease Sub-Specialty and  
NIH Sponsored Nuclear Cardiology Fellowship  
James T. Willerson MD- Chairman
- Mayo Graduate School of Medicine - Mayo Clinic 1978–1981  
Internal Medicine Specialty Training Program  
Edward C. Rosenow, III MD-Director
- Keck School of Medicine, University of Southern California 1974–1978  
Doctor of Medicine – Robert Tranquada MD- Dean
- University of Southern California 1971–1974  
Bachelor of Arts in Medicine, Phi Beta Kappa/Magna Cum Laude

## **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  
Member Emeritus Professor College

University of California, Los Angeles  
School of Medicine  
School of Public Health and  
Andersen Graduate School of Mgmt.

Duke University  
Fuqua School of Business  
School of Medicine

University of California, San Francisco  
Center for Health Professions  
School of Medicine

Harvard University  
School of Public Health  
School of Business  
Department of Health Policy and Mgmt.

University of Pennsylvania  
Leonard Davis Institute of Health  
Economics,  
The Wharton School  
Aresty Institute of Executive Education

Massachusetts Institute of Technology  
Whitaker College of Health Sciences,  
Technology and Management

University of Southern California  
School of Medicine  
Clinical Professor of Medicine  
School of Business  
School of Pharmacy  
Board of Councilors

Northwestern University  
School of Medicine

Stanford University  
School of Medicine



University of Texas, Southwestern  
School of Medicine  
Health Science Center

University of Virginia  
School of Medicine

Wake Forest University  
Bowman Gray School of Medicine

The Governance Institute  
Conference Faculty  
Board of Advisors  
School of Public Administration

Washington University in St. Louis  
Skandalaris Center National Council

### **OTHER PROFESSIONAL AFFILIATIONS (PAST/ PRESENT)**

National Association of Corporate Directors  
American College of Physician  
Executives/Leadership  
American College of Physicians  
American College of Medical Quality  
American College of Healthcare  
Executives  
American College of Occupational Medicine  
American Geriatrics Society  
American Hospital Association  
American Medical Association  
American Medical Directors Association  
American Medical Political Action Committee  
American Public Health Association  
Assoc. of Univ. Programs in Health Admin.  
American Management Association  
American Society on Aging  
Business Forum on Aging  
The Conference Board  
Edison Electric Institute  
Foundation for Health Services

Group Health Association of America  
Los Angeles World Affairs Council  
Managed Health Care Association  
Medical Group Management Association  
National Fund for Medical Education (NFME)  
National Resource Center on Worksite  
Health Promotion  
National Association of Employers on  
Health Care Action  
Nat'l Association of Managed Care  
Physicians  
National Health Policy Council  
National Governors' Association  
National Health Foundation  
National Leadership Coalition for Health  
Care Reform  
The Royal Society of Medicine  
Society for Ambulatory Care Professionals  
Self-Insurance Institute of America, Inc.  
Town Hall of California  
Washington Business Group on Health

### **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

