



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 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.





Luis Laurantzon

Director of Talent Management

At Goodroot, we take risks, try new things out, and go outside of our comfort zones to learn something new. It's about taking existing processes and making them better before trying to create a new process.

I'm proud to work here because I enjoy having the freedom to do my work in the best way possible. Using my knowledge in learning and development to be able to create trainings in a thoughtful manner, rather than putting together rushed material. I've also been able to learn new ways to deliver that material that I haven't used in the past, using new programs that I've had to teach myself and learn on the go.

Sheri Yuschak

VP, Controller

Being brave and bold in a professional environment is understanding that you are an asset to the company's mission. You are confident in your skills, willing to step out of your comfort zone, able to voice your opinion or expertise, be flexible to change, and willing to lead.

I've learned a lot about the healthcare industry at Goodroot and now have access to some of the best resources, so I'm very proud to be able to offer that insight and advice to my friends and family in return.



Brian Shonat

AVP, Business Development

The Goodroot culture and mission is what drives me and our sales team every day. We have talked about this at length, and it's a funny question that most sales reps get in their career; "Do you sell your product or services because you believe in them or is sales just your job?" Collectively, we all have the same mindset, and that is we truly believe in what we do. Selling is a very monotonous job when you break it down. Emails, calls, social media, conferences, meetings, etc. The basic premise of selling is getting someone to believe in you and your company, and to partner with you.

I am very passionate about what we do on a personal level, and that makes selling here easy. Telling people our story and seeing their response makes me proud to work here. I've sold for companies before that people found no interest or personal attachment to. That is not the case when I tell people about Goodroot and what we are accomplishing. Everyone has a nightmare healthcare experience that they are scarred from. At Goodroot, we strive to make healthcare a positive and accessible experience for everyone, and that's what makes our work so meaningful.



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

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.



Kim Lauranzon

General Manager

I'm proud to work at Goodroot because we are a group of companies united by a common purpose: to transform healthcare. With experts from all corners of the healthcare industry coming together, we are uniquely positioned to help patients in new and innovative ways. It's inspiring to see the impact we're making and to be part of a team that is so passionate about this mission.

The culture here pushes you to go outside your comfort zone. One experience that stands out to me is when I first joined RemedyOne. Although it



2016

was scary to step into the unknown, I was drawn to Mike's vision and felt compelled to take the leap. As General Manager, I had the opportunity to build processes from scratch and do whatever was needed to make our company succeed. This was certainly outside my comfort zone, but it ultimately led to a big win for both me and the company. I'm grateful for this experience and for the ways it has contributed to the success of RemedyOne and our overarching mission at Goodroot.



Goodroot Culture Book 2023

John Gilliam

Manager, Underwriting and Analytics



2017

At Goodroot, change is the only constant in what we do. There is always something new in the pipeline that nobody has ever considered before. That's what makes our jobs both exciting and challenging. Being brave and bold at RemedyOne means stepping outside of your comfort zone to reinvent healthcare, so it's more affordable and accessible for everyone. Special interests have made our healthcare system unsustainable, which creates an opportunity to change the overall mindset of our country. I'm part of an organization that believes that no one should go bankrupt because of a health catastrophe.

At RemedyOne, and across the entire Goodroot community, we're building solutions for lower cost, more efficient healthcare. We have some of the most dedicated and motivated people on our team. And we're very well positioned to address individual inadequacies of the overall healthcare system.

Jason Peterson

Clinical Pharmacist



2021

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!



Kevin Kobielski

President

The culture at AlignRx fosters productivity and innovation through its emphasis on the people who work here. We recognize that our accomplishments are directly tied to the dedication and talent of our colleagues. This is evident in our achievements, including 98% client retention, exceeding revenue and net income targets, and recruiting exceptional talent. The culture at AlignRx encourages an environment of constant improvement, where team members are free to come up with great ideas and drive them forward within the organization.

In times of adversity, the AlignRx team steps up and demonstrates their commitment to the company and its clients. The culture here encourages collaboration and support, not just within the company, but also from our partners in the Goodroot network.



Looking ahead to 2023, we're excited about our growth prospects and will continue to prioritize a client-first approach. AlignRx will explore new vendor relationships and continue to evolve our partnership with CoeoRx to offer unique solutions that drive costs down. We also plan to grow our team to support our scaling efforts.

The culture at AlignRx fosters productivity and innovation by emphasizing the importance of people and encouraging an environment of constant improvement and collaboration. Our commitment to clients and our partnership with Goodroot also contribute to success.



Greg Sanderson

Chief Information Officer



Reflecting on my time at AlignRx, I am incredibly proud to be part of such a dynamic and innovative company and I'm amazed at what our team has been able to accomplish in such a short amount of time. Despite this being my sixth Culture Book submission, I still find myself bursting with enthusiasm for the culture we have been able to create, and the strides we have made in the past year alone.

Our exceptional culture at AlignRx and Goodroot is defined by many factors; the relationships between employees at all levels, the willingness of leaders and staff to assist others, and our collective success just to name a few. We have become a company that not only encourages

employees to think creatively to solve complex healthcare issues, but also creates companies from scratch to implement these ideas. With Goodroot serving as the foundation that provides all the essential building blocks to start a company, we have created truly innovative and impactful products/companies that address significant challenges our customers face and that no other company has been able to solve.

It has been a privilege to be part of these innovative solutions, and I am eager to see what new ideas the new additions to our company will bring. I am incredibly proud to be part of AlignRx and the culture we have created here.



Monica Gindhart

Director, Account Management



At Goodroot, being able to be free and amplified is so important in allowing me to think outside of the box. When you aren't stuck in a one size fits all, you can do a better job for your clients and your work is rewarding and fulfilling. Our clients look to us to solve problems they can't and to be the experts. Allowing us to follow a passion on a program others may push away can lead to an out-of-the-box solution, making us unique and successful in the market.

Our brave and bold culture means taking a chance on something outside of our comfort zones and asking for something even when we're quite sure the answer is going to be "no." These situations lead you to places you weren't sure you would ever reach. Asking that question may lead to a "yes," which could positively impact everything you have been working for. If the answer is "no," then you are no worse than you were at the start. When you get that "yes," or maybe even a middle ground, it's a great feeling and such an accomplishment. Even the small wins count!

Kristen Lybrook

Director, Account Management



This is my third culture book entry and as I look back at my time at AlignRx I am so proud and excited about the work that we do together to support our partners and clients. We have added many new members to our team over the past few years and every time I am asked about our culture and why I like working here I talk about how great our team is and how much I enjoy working with every single person. It is amazing to work with a team of accomplished experts and to be able to learn and collaborate with them to find new

ways to bring solutions to our clients. Being part of the Goodroot community motivates me to become the best version of myself and reminds me of a quote by Winston Churchill: "Success is not final; Failure is not fatal; It is the courage to continue that counts."

I have no doubt that our persistence and passion in working to fix the broken healthcare system will lead to great things!





 Penstock | 2022

Peggy Greenlee

Senior Clinical Auditor

When people ask what I do in my job, I am very proud to tell them that aside from recovering overpayments for our clients—we are building the technology and expertise to correct errors at the source.

I would love to see a system that concentrates on providing comprehensive, multidisciplined, patient-centered care healthcare provided in the most cost-effective manner. I would love to see medical costs billed accurately the first time. The Goodroot mantra of “Let’s Go!” encourages us to get things done.

 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.

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.

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.

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!

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!



Goodroot Culture Book 2023

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.

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.

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!



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.

