



Jamie Greenleaf, AIF®, CBFA
Fiduciary Consultant and Principal
Greenleaf Advisors

Jamie Greenleaf, AIF®, CBFA is a Fiduciary Consultant and Principal of Greenleaf Advisors, as well as Co-Founder of Fiduciary In A Box. She is dedicated to helping employers implement disciplined, defensible fiduciary processes for ERISA-governed health plans—improving outcomes for both organizations and their employees.

Jamie’s mission is to reduce risk, ensure compliance, and drive stronger financial outcomes through proactive oversight, education, and transparency. With a distinguished foundation in retirement plan fiduciary governance, she brings that same rigor and structure to the healthcare space, guiding employers to design and manage high-quality, cost-effective benefit programs.

A recognized industry thought leader, Jamie, is a sought-after speaker and has delivered keynote presentations at leading conferences. She is also the recipient of the Marshall Allen Legacy Award for her contributions to advancing fiduciary best practices.

Jamie is passionate about transforming benefits from a cost center into a strategic asset, making them more meaningful, transparent, and sustainable for employers and the people they serve.



StanleyKup
LEGAL & COMPLIANCE

Jennifer Stanley, Esq.

Licensed Attorney | Health & Welfare Counsel | Employer Benefits Strategist | Employer

Professional Profile

Health and welfare attorney advising employers, plan sponsors, benefits consultants, brokers, and covered service providers on fiduciary responsibilities, employee benefits strategy, service provider contracting, and federal law compliance.

Extensive experience bringing clarity, structure, and accountability to benefits, addressing the fiduciary and fiduciary-in-function realities. Aligning contractual provisions with operational realities..

Recognized for legal precision, operational insight, direct communication, and the ability to translate complex legal and technical issues into practical guidance for employers and their advisors.

Core Experience

- Employer-sponsored health and welfare plan strategy
- TPA and PBM oversight and consulting
- Request for proposal (RFP) development and response review
- Vendor evaluation and selection
- Negotiation strategy and contracting
- HIPAA compliance, policies, procedures, and training
- Point-solution evaluation, contract negotiation, benchmarking
- Service provider compensation analysis, compensation disclosures, and prohibited transaction notices
- Benefits-related legal and operational risk assessment

Professional Experience

General Counsel for boutique broker; Marsh & McLennan Agency Compliance Center of Excellence; Holmes Murphy & Alera Group Compliance. Serve as Of Counsel for boutique brokers and service providers.

Entrepreneur: Founder of StanleyKup Legal & Compliance, 2022; BABD Data Services, 2023; Fiduciary Benefits Advisors, 2024; PrecisionHealth TPA 2025.

Health & Welfare Attorney Advises employers and other stakeholders in the employee benefits space on legal, strategic, and operational matters affecting health and welfare plans. Works closely with plan sponsors, benefits consultants, brokers, TPAs, PBMs, and other service providers to evaluate vendor arrangements, improve contract terms, remove conflicts of interests, clear compensation disclosures, agency filings and complaints

Representative areas of work include:

- Guiding employers and brokers through complex TPA and PBM procurements
- Developing and refining RFPs for benefits and pharmacy-related services
- Conducting vendor evaluations and supporting selection processes
- Advising on negotiation strategy and contract structure
- Identifying hidden fees, compensation issues, and pricing opacity



Assessing performance representations and operational claims made by vendors
Advising on HIPAA compliance and related health plan obligations
Supporting integration of point solutions within broader benefits ecosystems

Additional Professional Background

Brings a multidisciplinary perspective informed by years of advising plan sponsors, boutique consulting firms, TPAs, PBMs, and other benefits service providers as well as vetting vendors as a platform purchaser. This experience supports a practical understanding of compensation structures, operational realities, and behind-the-scenes decision-making dynamics affecting employer-sponsored healthcare arrangements.

Leadership and Professional Service

National Association of Benefits and Insurance Professionals (NABIP, formerly NAHU)

Vice Chair, National Legislative Council (2025-26)

President, Dallas chapter (2021-2022, 2022-2023, 2024-2025)

Member, NABIP Texas Legislative Council, eight years

Education

Texas Tech University School of Law Juris Doctor; Certificate in Health Law | 2013 | Phi Delta Phi Legal Honor Society

Texas A&M University, BS in Kinesiology | 2004

Earlier Healthcare Experience

Participated in Phase 3 clinical research trials at: Cooper Institute of Dallas, UT Southwestern Medical Center; Liver Institute of Methodist Dallas

Licensure

Licensed to practice law in Texas | Texas General Lines Life, Accident, Health, and HMO License

Professional Strengths

Analytical rigor

Direct and effective communication

Strong understanding of healthcare delivery, operational realities, costs of compliance, and exposure for failing to meet fiduciary duties

Ability to identify, uncover, and remove conflicts of interests, prohibited transactions, and contractual risk