

## Anna Yount

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**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 2:33 AM  
**To:** Jon Christensen  
**Cc:** derek@statefinancialofficers.com  
**Subject:** Re: HR 2319

Glad to try..

Dale R. Folwell, CPA  
NC State Treasurer  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)

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On Nov 14, 2018, at 11:12 PM, Jon Christensen <[Jon@cgpla.com](mailto:Jon@cgpla.com)> wrote:

Hello Treasurer Folwell:

Just left the Capitol Hill Club where I had a face to face with Patrick McHenry, the House Deputy Whip. He seemed to care very little for whether his state or any state had lower borrowing rates for long term debt issuances and or more capital available for borrowing in the private sector by small business owners offered by private commercial lenders.

Ted Budd rocks-he is with us. Mark Walker rocks-he understands the importance but Patrick gave me that "deer in the headlights look," (actually I know he is totally beholden to BlackRock, Fidelity, Vanguard and their trade group the ICI-so I am not totally surprised that he put Wall Street ahead of Main Street).

Could you weigh in with him on behalf of the people of North Carolina? HR 2319 needs to be placed on the Suspension Calendar for an up or down vote in December. That is all we are asking for. The Senate is ready to pass it before this session of Congress ends.

Let me know if there is anything I can do to help facilitate you weighing in with Congressman McHenry? I know how very busy you are and the vast amount of responsibility your office undertakes but we really need your help on this one, if possible.

[www.protectinvestorchoice.com](http://www.protectinvestorchoice.com)

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 2:35 AM  
**To:** Joe Hyde  
**Subject:** Re: My Usual Weekly Hours

Good to know. Best to everyone....

**Dale R. Folwell, CPA**  
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On Nov 14, 2018, at 3:51 PM, Joe Hyde <[Joe.Hyde@nctreasurer.com](mailto:Joe.Hyde@nctreasurer.com)> wrote:

Treasurer Folwell,

I am typically in the office on Wednesdays from 2-5pm and on Fridays from 8am-5pm. I will not be working at all next week due to Thanksgiving break.

Sincerely,  
Joe Hyde

**Joe  
Hyde**

Intern  
Office of the State Treasurer  
Office: (919) 814-4183  
<image001.png> 3200 Atlantic Avenue, Raleigh, NC 27604  
<image002.png><image003.png><image004.jpg><image005.png>  
<image006.png> [www.NCTreasurer.com](http://www.NCTreasurer.com)

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**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 2:45 AM  
**To:** Biller, Anthony J (78744)  
**Cc:** kshrkmn@michaelbest.com  
**Subject:** Re: Reince Event  
**Attachments:** image001.png

Thanks for the invite last night. Your introduction of Reince was engaging and timeless.  
Happy Holidays,  
Dale

 Michael Best

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 2:46 AM  
**To:** kshrkmn@michaelbest.com  
**Subject:** Katie, Thanks for your time . Look forward to the follow up with Andrew B in the West Wing. Happy Thanksgiving

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 2:55 AM  
**To:** Marni Jameson  
**Cc:** David Mildenberg  
**Subject:** Re: Marni, David is in CLT, editor of Business NC(the premier statewide publication) and would like to meet with you on this trip...  
**Attachments:** image005.jpg; image006.jpg; image007.jpg; image008.jpg; image009.jpg; image010.jpg; image011.jpg; image012.jpg

Good luck today...

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On Nov 14, 2018, at 5:19 PM, Marni Jameson <[marni@aid-us.org](mailto:marni@aid-us.org)> wrote:

Hi Dave,  
Sounds good. How about if I call you when I'm done with my meetings at Tryon? I will be in Southpark, at 5950 Fairview Rd., corner of Park South Road. Perhaps we can arrange to meet near there?

*Marni Jameson Carey*

Executive Director  
407-571-9316  
<image001.jpg>  
<image002.jpg><image003.jpg><image004.jpg>  
[www.aid-us.org](http://www.aid-us.org)

**From:** David Mildenberg <[dmildenberg@businessnc.com](mailto:dmildenberg@businessnc.com)>  
**Sent:** Wednesday, November 14, 2018 4:34 PM  
**To:** Marni Jameson <[marni@aid-us.org](mailto:marni@aid-us.org)>  
**Cc:** Dale Folwell <[Dale@nctreasurer.com](mailto:Dale@nctreasurer.com)>  
**Subject:** Re: Marni, David is in CLT, editor of Business NC(the premier statewide publication) and would like to meet with you on this trip...

Executive Director

407-571-9316



[www.aid-us.org](http://www.aid-us.org)

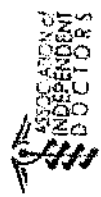
**From:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>  
**Sent:** Wednesday, November 14, 2018 3:55 PM  
**To:** [marni@aid-us.org](mailto:marni@aid-us.org); [dmildenberg@businessnc.com](mailto:dmildenberg@businessnc.com)  
**Subject:** Marni, David is in CLT, editor of Business NC(the premier statewide publication) and would like to meet with you on this trip...

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## Anna Yount

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**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 2:58 AM  
**To:** Frank Lester  
**Cc:** Anna Yount  
**Subject:** Re: Document  
**Attachments:** image013.png; image016.jpg; image017.png; image018.png; image001.png; image002.png; image004.jpg; image006.png

Are we doing ask me anything next Tuesday?

I may drop in on the Courier next Monday and do a story on the income tax cap..

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On Nov 14, 2018, at 1:40 PM, Frank Lester <[Frank.Lester@nctreasurer.com](mailto:Frank.Lester@nctreasurer.com)> wrote:

This is what I sent Neil per your instructions. Is this correct?

**Frank G. Lester**  
Deputy Treasurer  
Communications/Government Affairs  
Office of the State Treasurer  
Office: (919) 814-3811

3200 Atlantic Avenue, Raleigh, NC 27604  
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<image014.png><image015.png>





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DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA



NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 3:08 AM  
**To:** Bob Newman  
**Subject:** Re: BCBS' customer satisfaction lowest in industry, survey finds

No link

**Dale R. Folwell, CPA**  
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On Nov 14, 2018, at 12:37 PM, Bob Newman <[Bob.Newman@nctreasurer.com](mailto:Bob.Newman@nctreasurer.com)> wrote:

[dhhttps://www.beckershospitalreview.com/payer-issues/bcbs-customer-satisfaction-lowest-in-industry-survey-finds.html](https://www.beckershospitalreview.com/payer-issues/bcbs-customer-satisfaction-lowest-in-industry-survey-finds.html)

I have never had a problem with them.

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 3:15 AM  
**To:** Anna Yount  
**Subject:** Remind me verizon

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**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 7:07 AM  
**To:** Steve Toole; Chris Farr  
**Cc:** Frank Lester; Chris Farr; Bill Golden; Anna Yount  
**Subject:** Really sorry that I am missing the celebration for go-live. My Nov 16th schedule has been set for two months. Please relay my appreciation.

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**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 7:30 AM  
**To:** Frank Lester; Stephanie Hawco  
**Subject:** Am I meeting with High Point Enterprise next Monday? Is Bob Buckley confirmed?  
Thanks

**Dale R. Folwell, CPA**

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**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 8:31 AM  
**To:** melinda baran  
**Subject:** RE: Bank OZK (George Gleason)

Thanks for chairing the meeting yesterday. We had our first "bank creation" in NC in over 10 years. I chair the banking commission which had to move their day and time to facilitate the regulatory process.  
Happy Thangsgiving...

### Dale R. Folwell, CPA

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DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** melinda baran [mailto:mlbaran1948@gmail.com]  
**Sent:** Wednesday, October 24, 2018 2:48 PM  
**To:** Dale Folwell <Dale@Nctreasurer.com>  
**Subject:** Bank OZK (George Gleason)

Hello Dale--

I just wanted to let you know that the OZK third quarter results were released on 10/19 along with the earnings report conference call.

I read the report, read the transcript, read the management comments--and came to the conclusion that the algorithm bots have run amok and the analysts are acting like lemmings again. They sent the stock price down by nearly a half this week--so I started buying this week and picked up nearly 1700 shares.

I saw a golden buying opportunity which would increase my dividend yield from 2.9% to 3.43% and could increase my total return significantly with the 4th quarter numbers.

Just thought you might want to ask your equity analysts if they want to take a look at OZK for the pension fund now.

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 10:04 AM  
**To:** Stephanie Hawco  
**Cc:** Frank Lester; Anna Yount  
**Subject:** Re: Am I meeting with High Point Enterprise next Monday? Is Bob Buckley confirmed?  
Thanks

10 15 forBuckley.....I need to leave at 1035 from. Fox 8.

Jamie at 11, Leave asheboro @ 1125. Pinehurst at 12 20, The pilot @ 2

Just to keep Anna's attention,I may dip in and say hello to First Health...

**Dale R. Folwell, CPA**  
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On Nov 15, 2018, at 9:50 AM, Stephanie Hawco <[Stephanie.Hawco@nctreasurer.com](mailto:Stephanie.Hawco@nctreasurer.com)> wrote:

I contacted Paul Johnson to see if he can meet with you in High Point, and Jamie Biggs to see if she can meet with you in Asheboro on Monday. Bob Buckley is confirmed and Frank is providing him with information in advance of your meeting. Thanks.  
Stephanie

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 7:30 AM  
**To:** Frank Lester <[Frank.Lester@nctreasurer.com](mailto:Frank.Lester@nctreasurer.com)>; Stephanie Hawco <[Stephanie.Hawco@nctreasurer.com](mailto:Stephanie.Hawco@nctreasurer.com)>  
**Subject:** Am I meeting with High Point Enterprise next Monday? Is Bob Buckley confirmed? Thanks

**Dale R. Folwell, CPA**  
NC State Treasurer

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<image001.png> [www.NCTreasurer.com](http://www.NCTreasurer.com)  
<image002.png><image003.png><image004.jpg><image005.png>

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 10:08 AM  
**To:** annafolwell765@gmail.com  
**Subject:** Fwd: Transit riders, drivers brace for influx of Amazon employees

**Dale R. Folwell, CPA**  
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Begin forwarded message:

**From:** Bob Newman <[Bob.Newman@nctreasurer.com](mailto:Bob.Newman@nctreasurer.com)>  
**Date:** November 15, 2018 at 10:06:54 AM EST  
**To:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>  
**Subject:** Transit riders, drivers brace for influx of Amazon employees

<https://www.yahoo.com/news/transit-riders-drivers-brace-influx-060126549.html>



## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 10:41 AM  
**To:** Frank Lester  
**Subject:** Final presser???

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
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## Anna Yount

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**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 10:51 AM  
**To:** Bill Hennessey, M.D.  
**Subject:** Re: Pratter & State of NC

Not at this time.

I will look at the summary of the report that you previously did for NC.

You have probably explained it completely, but I don't understand why we don't have access to a report that NC has previously paid for in some way shape or form.

No need to respond.

Happy Thanksgiving

**Dale R. Folwell, CPA**  
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On Nov 15, 2018, at 10:24 AM, Bill Hennessey, M.D. <[bill.hennessey@pratter.us](mailto:bill.hennessey@pratter.us)> wrote:

Dale:

Would you like a 2017 and 2018 Pratter medical cost savings analysis (MCSA) performed on your state's de-identified medical claims data? We can start on yours after we are done with a national union analysis this weekend. And what was in New York that I missed? A state treasurers' meeting?

Goals:

1. Understand your cost driver by medical test name, medical provider name and real prices paid.
2. Then, design your health plan around your cost drivers.
3. This can include, but is not limited to, incentivizing employees with money on a reward card for going to better-priced providers for routine care like blood work and imaging.
4. Great access to healthcare for employees within state budget for 2019 and beyond.
5. All pricing on a search engine.

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 10:56 AM  
**To:** Sam Watts  
**Subject:** What was the other bill number to fix H1055

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## Anna Yount

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**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 11:31 AM  
**To:** Harrison, Nora  
**Subject:** Re: Statement of Economic Interest - Local Government Commission - 2018 Evaluation

Thanks,dale

Dale R. Folwell, CPA  
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On Nov 15, 2018, at 10:49 AM, Harrison, Nora <[Nora.Harrison@ncsbe.gov](mailto:Nora.Harrison@ncsbe.gov)> wrote:

Please see the attached evaluation letter. No response is required.

Pursuant to N.C.G.S. 163A-159(c), when an actual or potential conflict of interest is cited by the Board under N.C.G.S. 163A-189(e) with regard to a public servant sitting on a board, the conflict shall be recorded in the minutes of the applicable board and duly brought to the attention of the membership by the board's chair as often as necessary to remind all members of the conflict and to help ensure compliance with the Elections and Ethics Enforcement Act.

The Act mandates that all public servants attend an ethics and lobbying education presentation. Please review the attached document for additional information concerning this requirement.

Thank you,

Nora Harrison  
Compliance Analyst  
[Nora.harrison@ncsbe.gov](mailto:Nora.harrison@ncsbe.gov)  
NC Bipartisan State Board of Elections & Ethics Enforcement  
PO Box 27255  
Raleigh, NC 27611-7255  
<image001.jpg>

<Wood, Beth (Ex Officio Member) 2018.pdf>

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 1:18 PM  
**To:** noshner@wbttv.com  
**Subject:** FW: Antitrust lawsuit: Atrium Health, North Carolina settle | News & Observer

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Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
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-----Original Message-----

**From:** Bob Newman  
**Sent:** Thursday, November 15, 2018 1:15 PM  
**To:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>  
**Subject:** Antitrust lawsuit: Atrium Health, North Carolina settle | News & Observer

<https://www.newsobserver.com/news/state/north-carolina/article221701500.html>

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 1:20 PM  
**To:** noschner@wbttv.com  
**Subject:** FW: RELEASE: Attorney General Josh Stein Announces Settlement with Atrium over Healthcare Pricing  
**Attachments:** image001.png

### Dale R. Folwell, CPA

NC State Treasurer  
Office of the State Treasurer  
Office: (919) 814-3807

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NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Andrew Norton  
**Sent:** Thursday, November 15, 2018 10:11 AM  
**To:** Dale Folwell <Dale@Nctreasurer.com>; Chris Farr <Chris.Farr@nctreasurer.com>; Sam Hayes <Sam.Hayes@nctreasurer.com>; Frank Lester <Frank.Lester@nctreasurer.com>; Dee Jones <Dee.Jones@nctreasurer.com>  
**Subject:** Fwd: RELEASE: Attorney General Josh Stein Announces Settlement with Atrium over Healthcare Pricing

**Andrew J. Norton**  
Deputy General Counsel  
State Health Plan  
Office: (919) 814-4463

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.SHPNC.org](http://www.SHPNC.org)

=====

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- restrict them from offering consumers financial incentives to use lower cost, high quality providers;
- require Atrium's prior approval for insurers to introduce new, lower cost benefit plans; or
- require that Atrium be included in the most-preferred tier of benefit plans even if it does not meet price or value criteria.

"My office has appreciated our partnership with the U.S. Department of Justice in this matter," said Attorney General Josh Stein. "Together, we have been able to achieve greater competition and price transparency for healthcare consumers in the Charlotte area."

The settlement requires that Atrium notify insurance providers within 15 business days that it will no longer enter into or enforce contracts that violate the above terms.

A copy of the settlement can be found [here](#).

###



**Josh Stein, Attorney General**  
P R E S S   R E L E A S E

---



**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Thursday, November 15, 2018 1:24 PM  
**To:** Nochsner@wbttv.com  
**Subject:** FW: RELEASE: Attorney General Josh Stein Announces Settlement with Atrium over Healthcare Pricing  
**Attachments:** image001.png

**Dale R. Folwell, CPA**

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---

**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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Begin forwarded message:

**From:** "Mekeel, Jess" <[JMekeel@ncdoj.gov](mailto:JMekeel@ncdoj.gov)>  
**Date:** November 15, 2018 at 9:53:57 AM EST

greater competition and price transparency for healthcare consumers in the Charlotte area.”

The settlement requires that Atrium notify insurance providers within 15 business days that it will no longer enter into or enforce contracts that violate the above terms.

A copy of the settlement can be found [here](#).

###



**Josh Stein, Attorney General**  
P R E S S   R E L E A S E

---

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Friday, November 16, 2018 8:50 AM  
**To:** Bryan Jenkins  
**Subject:** Welcome to the building. Sorry I cannot be with you. I am westbound today. I know you will appreciate having Chris Farr sit in my absence. Thank you.

**Dale R. Folwell, CPA**

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---

**NORTH CAROLINA**  
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*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Friday, November 16, 2018 9:21 PM  
**To:** Marni  
**Subject:** Re: Marni, David is in CLT, editor of Business NC(the premier statewide publication) and would like to meet with you on this trip...

How was your meeting?

**Dale R. Folwell, CPA**  
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On Nov 15, 2018, at 1:04 PM, Marni <[marni@aid-us.org](mailto:marni@aid-us.org)> wrote:

Thank you. Just landed in Charlotte and saw this good news:

[https://www.modernhealthcare.com/article/20181115/NEWS/181119970?utm\\_source=modernhealthcare&utm\\_medium=email&utm\\_content=20181115-NEWS-181119970&utm\\_campaign=mh-alert](https://www.modernhealthcare.com/article/20181115/NEWS/181119970?utm_source=modernhealthcare&utm_medium=email&utm_content=20181115-NEWS-181119970&utm_campaign=mh-alert)

Marni

Sent from my Samsung Galaxy smartphone.

----- Original message -----

**From:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>  
**Date:** 11/15/18 2:55 AM (GMT-05:00)  
**To:** Marni Jameson <[marni@aid-us.org](mailto:marni@aid-us.org)>  
**Cc:** David Mildenberg <[dmildenberg@businessnc.com](mailto:dmildenberg@businessnc.com)>  
**Subject:** Re: Marni, David is in CLT, editor of Business NC(the premier statewide publication) and would like to meet with you on this trip...

Good luck today...

Best,

*Marni Jameson Carey*

Executive Director

407-571-9316



[www.aid-us.org](http://www.aid-us.org)

**From:** Marni Jameson <[marni@aid-us.org](mailto:marni@aid-us.org)>

**Sent:** Wednesday, November 14, 2018 4:06 PM

**To:** 'Dale Folwell' <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>; 'dmildenberg@businessnc.com' <[dmildenberg@businessnc.com](mailto:dmildenberg@businessnc.com)>

**Subject:** RE: Marni, David is in CLT, editor of Business NC(the premier statewide publication) and would like to meet with you on this trip...

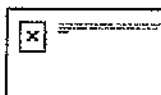
Sure – put us in touch!

I was thinking that you and I should talk Friday afternoon, following my meeting with Dale O. and Co.

*Marni Jameson Carey*

Executive Director

407-571-9316



[www.aid-us.org](http://www.aid-us.org)

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Saturday, November 17, 2018 8:34 AM  
**To:** Jerry Lankford  
**Cc:** Frank Lester; Karah Manning; Stephanie Hawco  
**Subject:** Re: From The Record

Jerry,  
Thanks for the time today.

frank,Steph,Karah,  
Can you get Jerry the healthcare and pension impact in Wilkes county similar to what we have done in other media markets. He needs it by noon on monday if possible. Also send him the bar graph from the us institute of medicine  
My caps lock is not working, sorry about typos..

**Dale R. Folwell, CPA**  
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On Nov 16, 2018, at 2:02 PM, Jerry Lankford <[jerrylankford@yahoo.com](mailto:jerrylankford@yahoo.com)> wrote:

Please send Wilkes impact information on healthcare and pension.

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Saturday, November 17, 2018 8:37 AM  
**To:** Bridges, Zeke  
**Cc:** jbownes@nccob.gov; rgrace@nccob.gov  
**Subject:** Re: Campbell Business School

Thanks,

Janice

I dont need to be in the loop. Would you mind forwarding this to the board member who is working on the "banking team competition " and was having trouble forming a NC team.

Zeke will forward to the Trust School in Buies Creek.

Dale

**Dale R. Folwell, CPA**  
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On Nov 15, 2018, at 3:20 PM, Bridges, Zeke <[bridges@campbell.edu](mailto:bridges@campbell.edu)> wrote:

Treasurer Folwell:

I passed your information on to Dean Kevin O'Mara of the Lundy Fetterman School of Business at Campbell. He should be in touch soon.

It was good to see you again.

Best regards,

Zeke

**U. Zeke Bridges III, J.D.**  
Asst. Dean of Administration  
Campbell Law School  
Raleigh, North Carolina



## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Saturday, November 17, 2018 8:38 AM  
**To:** Biller, Anthony J (78744)  
**Cc:** Hrkman, Katie S (53824)  
**Subject:** Re: Reince Event

I am in RDU all week, most every week. Thanks

**Dale R. Folwell, CPA**  
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On Nov 15, 2018, at 5:50 PM, Biller, Anthony J (78744) <[ajbiller@michaelbest.com](mailto:ajbiller@michaelbest.com)> wrote:

Treasurer Folwell,  
We were honored by your presence. Please let us know next time you're in town and available for lunch.  
Kind regards,  
Tony

Anthony J. Biller  
Partner  
Managing Partner, Raleigh Office  
T: 984.220.8744 | [michaelbest.com](http://michaelbest.com)  
Michael Best & Friedrich LLP

-----Original Message-----

From: Dale Folwell [<mailto:Dale@Nctreasurer.com>]  
Sent: Thursday, November 15, 2018 2:45 AM  
To: Biller, Anthony J (78744)  
Cc: Hrkman, Katie S (53824)  
Subject: Re: Reince Event

Thanks for the invite last night. Your introduction of Reince was engaging and timeless.

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Saturday, November 17, 2018 8:40 AM  
**To:** Anna Yount  
**Subject:** ENV. Honorable Rayne Brown. 416 Lee ave. Lexington,NC. 272(9 or 7). 5

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Saturday, November 17, 2018 10:43 AM  
**To:** Biller, Anthony J (78744); Anna Yount  
**Cc:** Hrkman, Katie S (53824); Sorey, Jane (78749); Lawrence, James R (78746)  
**Subject:** Re: Reince Event

I am not complaining but I have not been to lunch in RDU almost 2 years. Love for you to come by and visit. Atlantic ave.....Across from BS America office..

**Dale R. Folwell, CPA**  
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On Nov 17, 2018, at 10:33 AM, Biller, Anthony J (78744) <[ajbiller@michaelbest.com](mailto:ajbiller@michaelbest.com)> wrote:

Excellent. How about lunch Wednesday December 12?

**Anthony J. Biller**  
Partner  
Managing Partner, Raleigh Office  
T 984.220.8744 | [michaelbest.com](http://michaelbest.com)

<image001.png>  
Michael Best &  
Friedrich LLP

---

**From:** Dale Folwell [<mailto:Dale@Nctreasurer.com>]  
**Sent:** Saturday, November 17, 2018 8:38 AM  
**To:** Biller, Anthony J (78744)  
**Cc:** Hrkman, Katie S (53824)  
**Subject:** Re: Reince Event

I am in RDU all week, most every week. Thanks

\*\*\*\*\*

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Saturday, November 17, 2018 3:00 PM  
**To:** Biller, Anthony J (78744)  
**Subject:** Re: Reince Event

Anna. Pls arrange

**Dale R. Folwell, CPA**  
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On Nov 17, 2018, at 11:29 AM, Biller, Anthony J (78744) <[ajbiller@michaelbest.com](mailto:ajbiller@michaelbest.com)> wrote:

Sounds good. Would love to and I'll bring my colleague James Lawrence if you don't mind and assuming he's available. What time?

**Anthony J. Biller**  
Partner  
Managing Partner, Raleigh Office  
T 984.220.8744 | [michaelbest.com](http://michaelbest.com)

<image001.png>  
Michael Best &  
Friedrich LLP

---

**From:** Dale Folwell [<mailto:Dale@Nctreasurer.com>]  
**Sent:** Saturday, November 17, 2018 10:43 AM  
**To:** Biller, Anthony J (78744); Anna Yount  
**Cc:** Hrkman, Katie S (53824); Sorey, Jane (78749); Lawrence, James R (78746)  
**Subject:** Re: Reince Event

I am not complaining but I have not been to lunch in RDU almost 2 years. Love for you to come by and visit. Atlantic ave.....Across from BS America office..

=====

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On Nov 15, 2018, at 5:50 PM, Biller, Anthony J (78744)  
<[ajbiller@michaelbest.com](mailto:ajbiller@michaelbest.com)> wrote:

Treasurer Folwell,  
We were honored by your presence. Please let us know next time you're in town and available for lunch.  
Kind regards,  
Tony

Anthony J. Biller  
Partner  
Managing Partner, Raleigh Office  
T: 984.220.8744 | [michaelbest.com](http://michaelbest.com)  
Michael Best & Friedrich LLP

-----Original Message-----

From: Dale Folwell [<mailto:Dale@Nctreasurer.com>]  
Sent: Thursday, November 15, 2018 2:45 AM  
To: Biller, Anthony J (78744)  
Cc: Hrkman, Katie S (53824)  
Subject: Re: Reince Event

Thanks for the invite last night. Your introduction of Reince was engaging and timeless.  
Happy Holidays,  
Dale

Email Disclaimer

\*\*\*\*\*  
\*\*\*\*\*

The information contained in this communication may be confidential,

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Sunday, November 18, 2018 6:10 AM  
**To:** Thomas, Brad  
**Cc:** Sam Watts  
**Subject:** Re: follow up from Virginia Foxx

I will put someone in contact with you.  
Sam. See me. Dale

Dale R. Folwell, CPA  
NC State Treasurer  
Office of the State Treasurer  
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On Nov 16, 2018, at 4:06 PM, Thomas, Brad <[Brad.Thomas@mail.house.gov](mailto:Brad.Thomas@mail.house.gov)> wrote:

Hello Mr. Folwell, my name is Brad Thomas. I work for Chairwoman Virginia Foxx on the U.S. House of Representatives Committee on Education and the Workforce. She told me she had texted with you about a retirement issue that a teacher in her congressional district had raised with her. It seems there might be an IRS issue that is dictating North Carolina policy and I'm trying to track down the details on that. Could we set up a time to talk early next week or the week after Thanksgiving? Thank you!

**Brad Thomas**  
Senior Education Policy Advisor  
Committee on Education & the Workforce  
2257 Rayburn House Office Building  
202-225-6558  
[brad.thomas@mail.house.gov](mailto:brad.thomas@mail.house.gov)

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Monday, November 19, 2018 5:37 AM  
**To:** Dee Jones  
**Subject:** Hope you had a good weekend, I am looking at a "survey" that BCBS or SHP was doing to figure out consumer preferences. status?? Thanks

**Dale R. Folwell, CPA**  
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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Monday, November 19, 2018 5:41 AM  
**To:** Frank Lester; Anna Yount; Stephanie Hawco  
**Subject:** Can someone forward me (. And Jamie @ Asheboro) the press release where I spoke of the tax cap a few months ago. Also send the graph from the statewide results. Thanks

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Monday, November 19, 2018 11:24 AM  
**To:** jbiggs@courier-tribune.com  
**Subject:** Fwd: Link to video

Dale R. Folwell, CPA  
NC State Treasurer  
Office of the State Treasurer  
Office: (919) 814-3807

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Begin forwarded message:

**From:** "Bownes, Janice H" <jbownes@nccob.gov>  
**Date:** November 14, 2018 at 11:50:17 AM EST  
**To:** Anna.Yount <Anna.Yount@nctreasurer.com>, Brandon Watson <brandon.watson@nctreasurer.com>, Bridget Chisholm <bridget.chisholm@bwccconsulting.com>, "Brooks, Sharyn" <sharyn.brooks@nccommerce.com>, "Campbell, Rowe" <rcampbell@nccob.gov>, "Copeland, Anthony M" <acopeland@nccommerce.com>, dale <dale@nctreasurer.com>, Dana Stonestreet <Dana.Stonestreet@hometrustedbanking.com>, Don Vaughan <don.vaughan@vaughanlaw.com>, Fran Lawrence <Fran.lawrence@nctreasurer.com>, "Grace Valencia (BC asst.)" <Grace.Valencia@bwccconsulting.com>, "Herman Gaskins III" <hermangaskins@live.com>, Jennifer Scott <jenscottessq@gmail.com>, "Karen Crawford (Sepi asst.)" <krcrawford@sepiengineering.com>, "Karl Robinson" <karl@rrtransportationinc.com>, Ken Flynt <keflynt@aol.com>, "Ken Kinion" <ken.kinion@onemainfinancial.com>, "Erwin, Mark" <mark@erwincapital.com>, "Grace, Raymond" <rgrace@nccob.gov>, "Sallie Shuping Russell" <blueheaven02@aol.com>, "Sam Hayes (Treas)" <Sam.Hayes@nctreasurer.com>, Sepi Saidi <ssaidi@sepiengineering.com>, Spence Broadhurst <broadhursts@fnb-corp.com>, "Steve Coggins" <scoggins@routtreelosee.com>, Ted Ashby <tashby@surreybank.com>  
**Cc:** "Nguyen, Ha" <hnguyen@nccob.gov>  
**Subject:** Link to video

This message was sent securely using Zix

Hello Commission members,

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Monday, November 19, 2018 3:56 PM  
**To:** darrell.malcomb@ncleg.net  
**Cc:** Chris Farr  
**Subject:** Fwd: bio  
**Attachments:** LisaTGrimes.pdf; ATT00001.htm

Dale R. Folwell, CPA  
NC State Treasurer  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
www.NCTreasurer.com

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Begin forwarded message:

**From:** Lisa Grimes <ltg1@icloud.com>  
**Date:** November 19, 2018 at 3:52:49 PM EST  
**To:** <dale@nctreasurer.com>  
**Subject:** bio

Hi Dale,

Please see attached information.

Regards,  
**LISA T. GRIMES**  
919.805.4100

# Lisa T Grimes

Ltg1@icloud.com • 209 Chalon Drive, Cary, NC 27511 • 919.805.4100

## Overview

During the past 30 years, Lisa has spent the majority of her career in sales, business development, and executive management. Her first entrepreneurial experience was as one of the initial members of the management team of a PPD (a contract research organization - CRO), where she increased sales 450% in a 14 month period, leading to a successful IPO. She was then recruited to the role of President of a small Site Management Organization, where she lead the transition of the business to a full service CRO, ultimately culminating in the sale of the business to United Healthcare in 1998.

Since then, Lisa has served as the start-up CEO of Medigy, an integrative medicine company focused on human wellness, which she sold to Connective Health; Angiomics, an anti-angiogenesis company, which she sold to Protein Diagnostics Labs; and AcSentient, a specialty pharmaceutical company focused on ophthalmology, which she sold to ISTA. She also spent a decade as a member of the Executive Advisory Group of Campbell Alliance (now InVentiv Health), a leading pharmaceutical management consulting firm.

She currently serves as the President and CEO of PurThread, a North Carolina-based functional textile company. She is also Chairman of Galen, a small all natural oncology meal replacement company.

Lisa is an award-winning interior designer and co-owned a retail interior design showroom for many years while she took somewhat of a leave from full-time executive management. She also has experience in the franchise arena, having opened and overseen management of five Massage Envy franchises in North Carolina.

Lisa is a demonstrated leader with a track record of success; her strong interpersonal and team-building skills have been proven through her ability to identify, recruit and retain outstanding management teams. She has polished strategic thinking and negotiation skills which she effectively utilizes in business transactions. In summary, Lisa is an innovative, results-oriented manager who enjoys leading effective teams to create successful companies. She also especially enjoys assisting young people (especially women) in helping them to find their unique talents and encourages them to use them to find personal and professional fulfillment.

## Professional History

### **President and CEO**

July 2013 to Present

PurThread Technologies, Inc., Cary, NC

- Negotiated successful sale to United Healthcare.

**Vice President, Business Development**

March 1994 to May 1996

PPD, Inc., Morrisville, NC

- Recruited, trained and managed international sales, marketing and proposal development team.
- Led business development activities that increased sales over 450% during 14 month period.
- Developed and implemented successful international strategic plan for PPD and subsidiaries.
- Managed negotiations of contract terms.
- Served on executive management team.

**Manager, Director, Professional Affairs**

June 1991 to March 1994

Glaxo, Inc. (now GSK), Research Triangle Park, NC

- Developed and implemented innovative programs to help Glaxo establish, build and strengthen relationships with healthcare professionals, associations, and students.
- Developed and implemented corporate strategy for influencing hospital administrators.

**Assistant Dean for Development**

March 1990 to June 1991

University of North Carolina, Chapel Hill, NC

- Coordinated all fund-raising activities, including \$7.5 million Bicentennial campaign.
- Developed and managed public relations activities.

**Account Executive**

January 1989 to March 1990

CompuChem, Research Triangle Park, NC

- Established CompuChem as a leader in forensic quality drug testing.
- Exceeded sales goal by 100%.

**Hospital Sales Representative, Trainer, Supervisor**

September 1986 to January 1989

Beecham Laboratories, Bristol, TN

Education

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Monday, November 19, 2018 3:58 PM  
**To:** darrell.malcolm@ncleg.net  
**Subject:** Fwd: Undeliverable: bio  
**Attachments:** Delivery report; ATT00001.htm

**Dale R. Folwell, CPA**  
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Office of the State Treasurer  
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Begin forwarded message:

**From:** Mail Delivery System <[MAILER-DAEMON@nctreasurer.com](mailto:MAILER-DAEMON@nctreasurer.com)>  
**Date:** November 19, 2018 at 3:51:08 PM EST  
**To:** <[dale@nctreasurer.com](mailto:dale@nctreasurer.com)>  
**Subject:** Undelivered Mail Returned to Sender

This is the mail system at host [ZixGateway01.nctreasurer.com](http://ZixGateway01.nctreasurer.com).

I'm sorry to have to inform you that your message could not be delivered to one or more recipients. It's attached below.

For further assistance, please send mail to postmaster.

If you do so, please include this problem report. You can delete your own text from the attached returned message.

The mail system

<[darrell.malcomb@ncleg.net](mailto:darrell.malcomb@ncleg.net)>: host [gabo5.ncga.state.nc.us](http://gabo5.ncga.state.nc.us)[204.84.200.27] said:  
550 No such user ([darrell.malcomb@ncleg.net](mailto:darrell.malcomb@ncleg.net)) (in reply to RCPT TO command)

Delivery report (003)

Reporting-MTA: dns; ZixGateway01.nctreasurer.com

X-Proprietary-Queue-ID: 618121E311F

X-Proprietary-Sender: rfc822; dale@nctreasurer.com

Arrival-Date: Mon, 19 Nov 2018 15:51:08 -0500 (EST)

Final-Recipient: rfc822; darrell.malcomb@ncleg.net

Original-Recipient: rfc822;darrell.malcomb@ncleg.net

Action: failed

Status: 5.0.0

Remote-MTA: dns; gabo5.ncga.state.nc.us

Diagnostic-Code: smtp; 550 No such user (darrell.malcomb@ncleg.net)

Return-Path: Received: from 127.0.0.1 (ZixVPM [127.0.0.1]) by  
 Outbound.nctreasurer.com (Proprietary) with SMTP id 618121E311F for ; Mon, 19 Nov  
 2018 15:51:08 -0500 (EST) Received: from smtp-outbound.dst.local (unknown  
 [10.22.47.115]) (using TLSv1 with cipher AES128-SHA (128/128 bits)) (No client  
 certificate requested) by ZixGateway01.nctreasurer.com (Proprietary) with ESMTPS id  
 41B421E310E for ; Mon, 19 Nov 2018 15:51:07 -0500 (EST) Received: from DST-  
 EMBP4C.dst.local ([fe80::dd67:50eb:dbd6:9f2c]) by DST-ECHP4C.dst.local  
 ([fe80::31cb:a18d:2d63:d895%21]) with mapi id 14.03.0415.000; Mon, 19 Nov 2018  
 15:55:47 -0500 From: Dale Folwell To: "[darrell.malcomb@ncleg.net](mailto:darrell.malcomb@ncleg.net)" CC: Chris Farr  
 Subject: Fwd: bio Thread-Topic: bio Thread-Index:  
 AdSASb3wHfZWkes9Sz2PlC65OiZA0QAAIDeR Date: Mon, 19 Nov 2018 20:55:47  
 +0000 Message-ID: <[690AD775-2C97-4E09-BFB4-  
 21CBD55DDBB6@Nctreasurer.com](mailto:690AD775-2C97-4E09-BFB4-21CBD55DDBB6@Nctreasurer.com)> References: <[02f101d48049\\$d5580370\\$80080a50\\$@icloud.com](mailto:02f101d48049$d5580370$80080a50$@icloud.com)>  
 In-Reply-To: <[02f101d48049\\$d5580370\\$80080a50\\$@icloud.com](mailto:02f101d48049$d5580370$80080a50$@icloud.com)>  
 Accept-Language: en-US Content-Language: en-US X-MS-Has-Attach:  
 yes X-MS-TNEF-Correlator: Content-Type: multipart/mixed;  
 boundary="\_005\_690AD7752C974E09BFB421CBD55DDBB6Nctreasurercom\_"  
 MIME-Version: 1.0 X-VPM-MSG-ID: 93783375-139a-4014-8f6c-df3fd62c7105  
 X-VPM-HOST: [ZixGateway01.nctreasurer.com](mailto:ZixGateway01.nctreasurer.com) X-VPM-GROUP-ID: 7b12081a-3fb9-  
 4674-ae76-c60c1a14babb X-VPM-ENC-REGIME: Plaintext X-VPM-IS-HYBRID: 0



## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Monday, November 19, 2018 3:58 PM  
**To:** Lisa Grimes  
**Cc:** darrell.malcolm@ncleg.net; Chris Farr; Anna Yount  
**Subject:** Re: bio

Thanks

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)

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On Nov 19, 2018, at 3:53 PM, Lisa Grimes <[ltg1@icloud.com](mailto:ltg1@icloud.com)> wrote:

Hi Dale,

Please see attached information.

Regards,  
**LISA T. GRIMES**  
919.805.4100

<LisaTGrimes.pdf>

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 20, 2018 5:29 AM  
**To:** Greg Gaskins; Frank Lester  
**Subject:** Can you touch base with me about salem college..

Frank, also loris coclough

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 20, 2018 7:43 AM  
**To:** lauradouglass145@gmail.com  
**Cc:** Brenda Williams  
**Subject:** Brenda, Pls give Laura the appr. amount that leaves NCCASH every year to rightful owners AND scholarships mandated by NCGA, Thanks

---

### Dale R. Folwell, CPA

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Office: (919) 814-3807

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---

NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 20, 2018 10:25 AM  
**To:** Frank Lester; Chris Farr  
**Subject:** FW: Atrium employees sue system over health, retirement benefits | Charlotte Observer

Dale R. Folwell, CPA  
NC State Treasurer  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)

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-----Original Message-----

**From:** Bob Newman  
**Sent:** Tuesday, November 20, 2018 9:29 AM  
**To:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>  
**Subject:** Atrium employees sue system over health, retirement benefits | Charlotte Observer

<https://www.charlotteobserver.com/news/business/article221584890.html>

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 20, 2018 11:39 AM  
**To:** Steve Toole; Bill Golden; Chris Farr  
**Subject:** Can I be assured that the experience factor tables that reflect a 7% assumed rate of return have been built and will be in affect on Jan 1 retirements?

**Dale R. Folwell, CPA**

*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)



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**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 20, 2018 8:07 PM  
**To:** Anna Yount  
**Subject:** SHPlan brochure

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC  
27604  
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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 20, 2018 9:08 PM  
**To:** Chris Farr; Powell Baggett  
**Cc:** Anna Yount; Sam Hayes  
**Subject:** Re: Death in Family

Blessings

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

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On Nov 20, 2018, at 4:11 PM, Chris Farr <[Chris.Farr@nctreasurer.com](mailto:Chris.Farr@nctreasurer.com)> wrote:

See Powell's message.

**Chris  
Marie  
Farr**

*Chief of  
Staff/  
Chief  
Deputy  
Treasurer*  
Office of  
the State  
Treasurer

Office:  
(919)  
814-3817  
Cell:  
(919)  
588-0009

<image006.png>

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<image001.png> <image002.png> <image003.png> <image004.jpg> <image005.png>

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 20, 2018 9:25 PM  
**To:** jay.chaudhuri@ncleg.net  
**Subject:** Fwd: Big Pharma really, really doesn't want you to know the true value of its drugs - Los Angeles Times

**Dale R. Folwell, CPA**  
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Office of the State Treasurer  
Office: (919) 814-3807

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Begin forwarded message:

**From:** Dale Folwell <[dalefolwell@gmail.com](mailto:dalefolwell@gmail.com)>  
**Date:** November 20, 2018 at 8:58:50 PM EST  
**To:** <[dale@nctreasurer.com](mailto:dale@nctreasurer.com)>  
**Subject:** Fwd: Big Pharma really, really doesn't want you to know the true value of its drugs - Los Angeles Times

----- Forwarded message -----

From  
Date: Nov 20, 2018 5:09 PM  
Subject: Big Pharma really, really doesn't want you to know the true value of its drugs - Los Angeles Times  
To: "[dalefolwell@gmail.com](mailto:dalefolwell@gmail.com)" <[dalefolwell@gmail.com](mailto:dalefolwell@gmail.com)>  
Cc:

Some excellent quotes in this article.

<https://www.latimes.com/business/lazarus/la-fi-lazarus-drug-pricing-cvzio-20170217-story.html>



**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 20, 2018 9:42 PM  
**To:** gildad7@triad.rr.com  
**Subject:** This is Dale. I have lost your number again. Hope alls well

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 21, 2018 5:19 AM  
**To:** Ron Joyce  
**Cc:** Joyce Krawiec  
**Subject:** Re: UNC Health Care System's Secrecy

Thanks

Dale R. Folwell, CPA  
NC State Treasurer  
Office of the State Treasurer  
Office: (919) 814-3807

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On Nov 20, 2018, at 3:48 PM, Ron Joyce <[ronjoyce@joycefoods.com](mailto:ronjoyce@joycefoods.com)> wrote:

Dear Senator Krawiec,

As you know, Blue Cross and Blue Shield administers health care for state workers and retirees. Are you aware of the problem that Dale Folwell is having getting information from the UNC Health Care System on its contractual arrangement with BCBS? UNC Health says the rates it negotiated with BCBS are exempt from disclosure under the NC Public Records Act. What are they hiding, and how is Dale supposed to do his job? As a tax payer, I think the more transparency the better.

Is it time for the NC Legislature to require that UNC Health makes its insurance reimbursement rates public?

Thank you for looking into this.

Best Regards,

**RON JOYCE**  
**PRESIDENT & CEO**  
**JOYCE FARMS**  
**4787 KINNAMON ROAD**  
**WINSTON-SALEM, NC 27103**  
**(336) 766-9900 EXT. 4712**

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 21, 2018 5:19 AM  
**To:** Matthew Krimm  
**Cc:** Christopher Morris  
**Subject:** Re: MTD performance through 11/19 close

Total return for the year?

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
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On Nov 20, 2018, at 12:38 PM, Matthew Krimm <[Matthew.Krimm@nctreasurer.com](mailto:Matthew.Krimm@nctreasurer.com)> wrote:

Treasurer,

Per your request, Total Pension performance is up around 40 basis points for the month to date through 11/19 (today is down a little more). Our total equity is flat MTD (11/19), with domestic equities down around 2%, International up a little over 1% (driven by emerging markets), and some positive returns in our hedged equity portfolio. Fixed income is up about ½ of 1%.

Please let me know if you would like additional information.

**Matthew  
Krimm,  
CFA, FRM,  
CAIA**  
*Director -  
Investment  
Operations and  
Risk  
Investment*

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)

<image013.png> <image014.png> <image015.png> <image016.jpg> <image017.png>

## Anna Yount

---

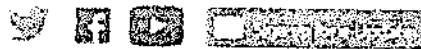
**From:** Dale Folwell  
**Sent:** Wednesday, November 21, 2018 10:28 AM  
**To:** Troy March  
**Cc:** Chris Farr  
**Subject:** Thanks for bringing the material by from the meeting. I am working with the President and his family on an "end of life " legacy in honor of his mother that can apply to the SHPlan.

---

### Dale R. Folwell, CPA

*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)



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**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 21, 2018 10:38 AM  
**To:** lauradouglass145@gmail.com  
**Subject:** FW: Link to video

Video that I promised you and John is at the bottom

**Dale R. Folwell, CPA**

*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)



---

**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Dale Folwell  
**Sent:** Monday, November 19, 2018 11:24 AM  
**To:** jbiggs@courier-tribune.com  
**Subject:** Fwd: Link to video

**Dale R. Folwell, CPA**  
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This message was secured by Zix®.

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 21, 2018 11:41 AM  
**To:** mikedarakash@hotmail.com  
**Subject:** I was cleaning up some files and came across a nice note from you regarding my interview with Bill Friday. Hope you are well! Happy thanksgiving.

**Dale R. Folwell, CPA**  
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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 21, 2018 11:52 AM  
**To:** NCDST- ALL USERS  
**Subject:** Happy Thanksgiving

DST Employees,

During this time of Thanksgiving, we have an important opportunity to reflect on the things for which we are most grateful. Included among them is our ability to serve the people of North Carolina.

I want to thank you for bringing your passion, integrity, and ability to the important work you do here day in and day out. May the good things of life be yours in abundance, not only during this Thanksgiving but throughout the coming year.

Enjoy the long weekend to relax, reflect, and spend some extra time with your loved ones. Come back refreshed and inspired to finish out the year strong.

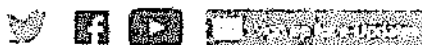
Happy Thanksgiving,

Dale R. Folwell, CPA

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**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 21, 2018 1:48 PM  
**To:** Edgar Starnes  
**Subject:** Did you set up a meeting with a Rep. at the NCGA where you are not going to attend?

**Dale R. Folwell, CPA**  
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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 21, 2018 5:10 PM  
**To:** lobbyjunk@gmail.com  
**Subject:** Fwd: Link to video

Dale R. Folwell, CPA  
NC State Treasurer  
Office of the State Treasurer  
Office: (919) 814-3807

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Begin forwarded message:

**From:** "Bownes, Janice H" <[jbownes@nccob.gov](mailto:jbownes@nccob.gov)>  
**Date:** November 14, 2018 at 11:50:17 AM EST  
**To:** Anna.Yount <[Anna.Yount@nctreasurer.com](mailto:Anna.Yount@nctreasurer.com)>, Brandon Watson <[brandon.watson@nctreasurer.com](mailto:brandon.watson@nctreasurer.com)>, Bridget Chisholm <[bridget.chisholm@bwccconsulting.com](mailto:bridget.chisholm@bwccconsulting.com)>, "Brooks, Sharyn" <[sharyn.brooks@nccommerce.com](mailto:sharyn.brooks@nccommerce.com)>, "Campbell, Rowe" <[rcampbell@nccob.gov](mailto:rcampbell@nccob.gov)>, "Copeland, Anthony M" <[acopeland@nccommerce.com](mailto:acopeland@nccommerce.com)>, dale <[dale@nctreasurer.com](mailto:dale@nctreasurer.com)>, Dana Stonestreet <[Dana.Stonestreet@hometrustedbanking.com](mailto:Dana.Stonestreet@hometrustedbanking.com)>, Don Vaughan <[don.vaughan@vaughanlaw.com](mailto:don.vaughan@vaughanlaw.com)>, Fran Lawrence <[Fran.lawrence@nctreasurer.com](mailto:Fran.lawrence@nctreasurer.com)>, "Grace Valencia (BC asst.)" <[Grace.Valencia@bwccconsulting.com](mailto:Grace.Valencia@bwccconsulting.com)>, "Herman Gaskins III" <[hermangaskins@live.com](mailto:hermangaskins@live.com)>, Jennifer Scott <[jenscottsq@gmail.com](mailto:jenscottsq@gmail.com)>, "Karen Crawford (Sepi asst.)" <[kcrawford@sepiengineering.com](mailto:kcrawford@sepiengineering.com)>, "Karl Robinson" <[karl@rrtransportationinc.com](mailto:karl@rrtransportationinc.com)>, Ken Flynt <[keflynt@aol.com](mailto:keflynt@aol.com)>, "Ken Kinion" <[ken.kinion@onemainfinancial.com](mailto:ken.kinion@onemainfinancial.com)>, "Erwin, Mark" <[mark@erwincapital.com](mailto:mark@erwincapital.com)>, "Grace, Raymond" <[rgrace@nccob.gov](mailto:rgrace@nccob.gov)>, "Sallie Shuping Russell" <[blueheaven02@aol.com](mailto:blueheaven02@aol.com)>, "Sam Hayes (Treas)" <[Sam.Hayes@nctreasurer.com](mailto:Sam.Hayes@nctreasurer.com)>, Sepi Saidi <[ssaidi@sepiengineering.com](mailto:ssaidi@sepiengineering.com)>, Spence Broadhurst <[broadhursts@fmb-corp.com](mailto:broadhursts@fmb-corp.com)>, "Steve Coggins" <[scoggins@routtreelosee.com](mailto:scoggins@routtreelosee.com)>, Ted Ashby <[tashby@surreybank.com](mailto:tashby@surreybank.com)>  
**Cc:** "Nguyen, Ha" <[hnguyen@nccob.gov](mailto:hnguyen@nccob.gov)>  
**Subject:** Link to video

This message was sent securely using Zix

Hello Commission members,

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 21, 2018 5:12 PM  
**To:** Dee Jones; Chris Farr  
**Subject:** We had a very short window to suggest someone to the SHPlan board. we will know next week. thanks

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
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**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Thursday, November 22, 2018 9:08 AM  
**To:** Jerry Lankford  
**Subject:** Re: Jerry Lankford at The Record

10 4

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

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On Nov 21, 2018, at 2:57 PM, Jerry Lankford <[jerrylankford@yahoo.com](mailto:jerrylankford@yahoo.com)> wrote:

You are a good man and I just want you to know that we all appreciate your efforts. I hope you and yours have a great Thanksgiving.

Thank you again  
Jerry Lankford

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Friday, November 23, 2018 5:04 AM  
**To:** gildad7@triad.rr.com  
**Subject:** Re: This is Dale. I have lost your number again. Hope alls well

Thanks

**Dale R. Folwell, CPA**  
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On Nov 22, 2018, at 5:05 PM, "gildad7@triad.rr.com" <gildad7@triad.rr.com> wrote:

Hi Dale,  
I also texted you my cell phone number  
336 813 1257  
Happy Thanksgiving.  
priest

---- Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)> wrote:

Dale R. Folwell, CPA  
NC State Treasurer  
Office of the State Treasurer  
Office: (919) 814-3807<tel:(919)%20814-3807>

[<https://www.nctreasurer.com/esignature%20public%20files/line.png>]

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Saturday, November 24, 2018 10:27 PM  
**To:** Bob Klaus  
**Subject:** Re: Thanks

I did take a behind the scenes tour when I spoke to the City/County managers last year.  
Take care

**Dale R. Folwell, CPA**  
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On Nov 24, 2018, at 7:51 PM, Bob Klaus <[bklaus@dpacnc.com](mailto:bklaus@dpacnc.com)> wrote:

Appreciated your kind words and the clipping you sent.

Hope to say hello in person one day.

Cheers!

**DPAC** | **Bob Klaus** | General Manager | Durham Performing Arts Center | 123 Vivian Street, Durham, North Carolina 27701 | 919.281.0586 | [DPACnc.com](http://DPACnc.com) | Operated under the direction of Nederlander & PFM

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Saturday, November 24, 2018 10:28 PM  
**To:** Stephen A. Bibey  
**Subject:** Re: November Moore County Men's RepRepublican followup

We only have 6 attorneys. Will keep you in mind.

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
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On Nov 24, 2018, at 7:00 PM, Stephen A. Bibey <[sabibey@embarqmail.com](mailto:sabibey@embarqmail.com)> wrote:

Hello Sir,

It was nice seeing you and your wife at the meeting and I always enjoy hearing about how you are watching out for our NC purse spending, as well as 'fraud, waste & abuse'. Also, I pray your family is enjoying a blessed Thanksgiving!

As you may recall, I fell short in my re-election bid to serve. I am now considering all options as I go forward and am respectfully asking that you might consider the possibility of a position within your Dept; or in the alternative, any referral or suggestions you may have.

I am most appreciative.

—  
STEPHEN A. BIBEY  
District Court Judge 19B  
910-639-9284  
[sabibey@embarqmail.com](mailto:sabibey@embarqmail.com)

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Sunday, November 25, 2018 10:54 AM  
**To:** Laura Rowe  
**Cc:** Chris Farr; Anna Yount  
**Subject:** Re: Debt Affordability Resumes

Remind me to put a bow on this monday

**Dale R. Folwell, CPA**  
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On Nov 15, 2018, at 10:35 AM, Laura Rowe <[Laura.Rowe@nctreasurer.com](mailto:Laura.Rowe@nctreasurer.com)> wrote:

Good Morning,

Following this morning's Boards and Commissions discussion, attached are the resumes for Debt Affordability Advisory Committee members Frank Aikmus and Bradford Briner. Alisia explained that they do not keep meeting minutes for these meetings, rather the members review the report, any needed changes are made and the report is submitted to the General Assembly.

The appointment histories for these members are also below:

		Appointer	TERM BEGAN	Re-Appointment	Term Length	TERM ENDS
Frank	Aikmus	President Pro Tempore	10/3/2011	----- 7/7/2013 1/6/2015	15 months 2 years 3 years	12/31/2012 12/31/2014 12/31/2017 [No apparent term reappointed]
Bradford	Briner	President Pro Tempore	11/21/2013	----- 1/6/2015	13 months 3 years	12/31/2014 12/31/2017 [No apparent term reappointed]



## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Sunday, November 25, 2018 1:22 PM  
**To:** dalefolwell@gmail.com  
**Subject:** Fwd: Legislator Letters  
**Attachments:** image001.png; ATT00001.htm; image002.png; ATT00002.htm; image003.png; ATT00003.htm; image004.jpg; ATT00004.htm; image005.png; ATT00005.htm; image006.png; ATT00006.htm; SenatePRIltrv5.docx; ATT00007.htm; HousePRIltrv5.docx; ATT00008.htm

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Begin forwarded message:

**From:** Frank Lester <[Frank.Lester@nctreasurer.com](mailto:Frank.Lester@nctreasurer.com)>  
**Date:** November 24, 2018 at 12:24:30 PM EST  
**To:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>  
**Subject:** Legislator Letters

attached

**Frank G. Lester**  
Deputy Treasurer  
Communications/Government Affairs

—

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)









STATE TREASURER OF NORTH CAROLINA

DALE R. FOLWELL, CPA

November 20, 2018

North Carolina General Assembly  
House of Representatives

Dear Representative:

First of all, let me apologize and say how embarrassed I am to just now be exercising my statutory authority to reduce health care costs for the taxpayers of this state. As you may have heard, the State Health Plan has launched a new medical reimbursement strategy for North Carolina providers that care for State Health Plan (Plan) members. This effort is part of a longer term strategy to take advantage of the Plan's "largeness" to keep rising health care costs under control while promoting quality care, transparency and affordability.

I know that you and the other members of the North Carolina General Assembly want me to keep costs under control. Right now, medical and pharmaceutical costs for the Plan are likely to increase by five to seven percent over the next ten years. But, as you know, the governor and General Assembly have approved only four percent annual increase during this budget cycle. There is no combination of five and seven that will give you four.

For decades, the Plan has used Blue Cross and Blue Shield of North Carolina's (Blue Cross NC) commercial network of providers. Blue Cross NC and medical providers consider fee schedules (what they charge) associated with this network to be "confidential." In other words, we know what we are paying, but not what we are *supposed* to pay. Whether it is a cup of coffee or a tank of gas, you know the relative value of what you are purchasing. That is not the case with health care.

In 2011, Auditor Beth Wood issued a performance audit of the Plan noting that "[t]he Plan is at risk for overpaying medical claims because the Plan's auditors do not have access to BCBSNC contracts and cannot independently verify that the Plan receives the proper contractual discounts from BCBSNC's provider network."

Starting on January 1, 2020, the Plan will move away from a commercial-based payment model to a reference-based government pricing model to reimburse health care providers for their services. This initiative was unanimously approved by the Board of Trustees on October 22.

The movement to a referenced-based pricing model aligns the Plan appropriately as a government payer instead of a commercial payer. On average, the Plan will pay 77 percent above the cost of delivering medical services. In fact, many providers such as independent Primary Care Providers, Mental Health Providers and Critical Access Providers (rural hospitals) will see fee increases under the new rate structure.











November 20, 2018

North Carolina General Assembly  
Senate

Dear Senator:

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NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



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DALE R. FOLWELL, CPA

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**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Sunday, November 25, 2018 1:26 PM  
**To:** syfolwell@gmail.com  
**Subject:** Fwd: Legislator Letters  
**Attachments:** image001.png; ATT00001.htm; image002.png; ATT00002.htm; image003.png; ATT00003.htm; image004.jpg; ATT00004.htm; image005.png; ATT00005.htm; image006.png; ATT00006.htm; SenatePRIltrv5.docx; ATT00007.htm; HousePRIltrv5.docx; ATT00008.htm

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Begin forwarded message:

**From:** Frank Lester <[Frank.Lester@nctreasurer.com](mailto:Frank.Lester@nctreasurer.com)>  
**Date:** November 24, 2018 at 12:24:30 PM EST  
**To:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>  
**Subject:** Legislator Letters

attached

**Frank G. Lester**  
Deputy Treasurer  
Communications/Government Affairs

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*Dale R. Folwell, CPA*

STATE TREASURER OF NORTH CAROLINA

DALE R. FOLWELL, CPA

November 20, 2018

North Carolina General Assembly  
Senate

Dear Senator:

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For decades, the Plan has used Blue Cross and Blue Shield of North Carolina's (Blue Cross NC) commercial network of providers. Blue Cross NC and medical providers consider fee schedules (what they charge) associated with this network to be "confidential." In other words, we know what we are paying, but not what we are *supposed* to pay. Whether it is a cup of coffee or a tank of gas, you know the relative value of what you are purchasing. That is not the case with health care.

In 2011, Auditor Beth Wood issued a performance audit of the Plan noting that "[t]he Plan is at risk for overpaying medical claims because the Plan's auditors do not have access to BCBSNC contracts and cannot independently verify that the Plan receives the proper contractual discounts from BCBSNC's provider network."

Starting on January 1, 2020, the Plan will move away from a commercial-based payment model to a reference-based government pricing model to reimburse health care providers for their services. This initiative was unanimously approved by the Board of Trustees on October 22.

The movement to a referenced-based pricing model aligns the Plan appropriately as a government payer instead of a commercial payer. On average, the Plan will pay 77 percent above the cost of delivering medical services. In fact, many providers such as independent Primary Care Providers, Mental Health Providers and Critical Access Providers (rural hospitals) will see fee increases under the new rate structure.

















STATE TREASURER OF NORTH CAROLINA

DALE R. FOLWELL, CPA

November 20, 2018

North Carolina General Assembly  
House of Representatives

Dear Representative:

First of all, let me apologize and say how embarrassed I am to just now be exercising my statutory authority to reduce health care costs for the taxpayers of this state. As you may have heard, the State Health Plan has launched a new medical reimbursement strategy for North Carolina providers that care for State Health Plan (Plan) members. This effort is part of a longer term strategy to take advantage of the Plan's "largeness" to keep rising health care costs under control while promoting quality care, transparency and affordability.

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NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Sunday, November 25, 2018 2:35 PM  
**To:** Edgar Starnes; josh.dobson@ncleg.net  
**Subject:** Please welcome a representative from SEANC to the provider reimbursement meeting on Monday at 3 o'clock. Thanks

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC  
27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)

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**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Sunday, November 25, 2018 7:28 PM  
**To:** Edgar Starnes  
**Subject:** Re: Rep. Dobson

Her name?

**Dale R. Folwell, CPA**  
NC State Treasurer  
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On Nov 25, 2018, at 4:09 PM, Edgar Starnes <[Edgar.Starnes@nctreasurer.com](mailto:Edgar.Starnes@nctreasurer.com)> wrote:

Representative Dobson's great grandmother died and the funeral is tomorrow. He wishes to reschedule at 9:30 Tuesday. Does this work for you?

Edgar V. Starnes  
Senior Policy Advisor and Legislative Liaison  
Office of the State Treasurer  
Phone: (919) 814-3812

[3200 Atlantic Avenue, Raleigh, NC 27604](http://3200 Atlantic Avenue, Raleigh, NC 27604)  
[www.NCTreasurer.com](http://www.NCTreasurer.com)

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Sunday, November 25, 2018 7:50 PM  
**To:** Laura Rowe  
**Cc:** Chris Farr; Anna Yount  
**Subject:** Re: Debt Affordability Resumes  
**Attachments:** image004.png; image006.png; image012.png

Laura, I need their phone numbers asap. Thanks

**Dale R. Folwell, CPA**  
NC State Treasurer  
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On Nov 15, 2018, at 10:35 AM, Laura Rowe <[Laura.Rowe@nctreasurer.com](mailto:Laura.Rowe@nctreasurer.com)> wrote:

Good Morning,

Following this morning's Boards and Commissions discussion, attached are the resumes for Debt Affordability Advisory Committee members Frank Aikmus and Bradford Briner. Alisia explained that they do not keep meeting minutes for these meetings, rather the members review the report, any needed changes are made and the report is submitted to the General Assembly.

The appointment histories for these members are also below:

		Appointer	TERM BEGAN	Re-Appointment	Term Length	TERM ENDS
Frank	Aikmus	President Pro Tempore	10/3/2011	----- 7/7/2013 1/6/2015	15 months 2 years 3 years	12/31/2012 12/31/2014 12/31/2017 [No apparent term reappointed]
Bradford	Briner	President Pro Tempore	11/21/2013	----- 1/6/2015	13 months 3 years	12/31/2014 12/31/2017 [No apparent term reappointed]





NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



*John P. Fowell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOWELL, CPA



## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Sunday, November 25, 2018 8:25 PM  
**To:** Edgar Starnes  
**Subject:** Re: Rep. Dobson

Sorry about the news .. Please retrieve her name so I can send card..

**Dale R. Folwell, CPA**  
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On Nov 25, 2018, at 8:03 PM, Edgar Starnes <[Edgar.Starnes@nctreasurer.com](mailto:Edgar.Starnes@nctreasurer.com)> wrote:

I have no idea. She was 96 is all he told me.

Edgar V. Starnes  
Senior Policy Advisor and Legislative Liaison  
Office of the State Treasurer  
Phone: (919) 814-3812

3200 Atlantic Avenue, Raleigh, NC 27604  
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---

On Nov 25, 2018, at 7:28 PM, Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)> wrote:

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Sunday, November 25, 2018 9:22 PM  
**To:** dalefolwell@gmail.com  
**Subject:** Fwd: TAS

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

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Begin forwarded message:

**From:** Bob Luddy <[bob@captiveaire.com](mailto:bob@captiveaire.com)>  
**Date:** November 25, 2018 at 9:18:16 PM EST  
**To:** Dale Folwell <[dale.folwell@nctreasurer.com](mailto:dale.folwell@nctreasurer.com)>  
**Subject:** TAS

<https://spectator.org/federal-intervention-is-a-killer/>

Robert Luddy  
Sent from my iPad

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Sunday, November 25, 2018 9:26 PM  
**To:** Bob Luddy  
**Subject:** Re: TAS

Well said.

Sending you a video. It lasts 3 minutes.

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
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On Nov 25, 2018, at 9:18 PM, Bob Luddy <[bob@captiveaire.com](mailto:bob@captiveaire.com)> wrote:

<https://spectator.org/federal-intervention-is-a-killer/>

Robert Luddy  
Sent from my iPad

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Sunday, November 25, 2018 9:28 PM  
**To:** bob@captiveaire.com  
**Subject:** Fwd: Video  
**Attachments:** image001.png; image002.png; image003.png; image004.jpg; image005.png; image006.png

Dale R. Folwell, CPA  
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Begin forwarded message:

**From:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>  
**Date:** November 9, 2018 at 5:09:49 PM EST  
**To:** "JPatten@mcgriffinsurance.com" <[JPatten@mcgriffinsurance.com](mailto:JPatten@mcgriffinsurance.com)>  
**Subject:** Fwd: Video

Dale R. Folwell, CPA  
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NORTH CAROLINA  
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*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 5:22 AM  
**To:** Bob Luddy  
**Cc:** Anna Yount  
**Subject:** Re: TAS

Anna, pls forward Gordon article to Mr Lundy,,,Thanks

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
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<https://spectator.org/federal-intervention-is-a-killer/>

Robert Luddy  
Sent from my iPad

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 8:06 AM  
**To:** Stephanie Hawco  
**Cc:** Frank Lester  
**Subject:** I spoke with gov McCrory. Can you call his producer and schedule this week and every two weeks?Thanks

**Dale R. Folwell, CPA**  
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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 8:31 AM  
**To:** Andrew Norton; Dee Jones; Sam Hayes; Ted Enarson  
**Subject:** Fwd: Release  
**Attachments:** image001.png; ATT00001.htm; image002.png; ATT00002.htm; image003.png; ATT00003.htm; image004.jpg; ATT00004.htm; image005.png; ATT00005.htm; image006.png; ATT00006.htm; Atriumsuitsrls11.18v2.docx; ATT00007.htm

This will be going out at 10. Pleasereview. We are adding the word potentially to the headline

**Dale R. Folwell, CPA**  
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Begin forwarded message:

**From:** Frank Lester <[Frank.Lester@nctreasurer.com](mailto:Frank.Lester@nctreasurer.com)>  
**Date:** November 25, 2018 at 3:15:10 PM EST  
**To:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>  
**Subject:** Release

Treasurer – Per our conversation, please see attached as the revised release. Frank

**Frank G. Lester**  
Deputy Treasurer  
Communications/Government Affairs  
Office of the State Treasurer  
Office: (919) 814-3811

—

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)



















NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA



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STATE TREASURER OF NORTH CAROLINA

DALE R. FOLWELL, CPA

*Dale R. Folwell, CPA*

FOR IMMEDIATE RELEASE

November 26, 2018

Contact: Frank Lester

919-814-3811

**Treasurer Folwell Calls for US Department of Justice to Recover the  
Hundreds of Millions owed to NC Taxpayers from Hospital-Managements'  
Anti-Competitive Activities**

*Calls for Pricing Transparency from all North Carolina Hospitals*

(Raleigh, N.C.) – State Treasurer Dale R. Folwell, CPA, today called for all North Carolina hospitals to be transparent in their pricing. The announcement was made in light of the recent settlement of a lawsuit filed by the U.S. Department of Justice and the North Carolina Department of Justice against Atrium Health formerly known as Carolinas Healthcare System.

The civil antitrust lawsuit challenged provisions in Atrium's contracts that prohibited steering in the hospital system's contracts with major health providers including Blue Cross Blue Shield of North Carolina. Steering is a method used by providers to direct consumers towards higher priced alternatives.

"For too long the largest hospital system in North Carolina has been engaging in this and other anticompetitive activities," said Treasurer Folwell. "In the spirit of this settlement, I'm calling on all hospitals to be transparent and to publish their prices so consumers can make informed decisions regarding health care value. I'm also calling for the U.S. Department for Justice to recover the hundreds of millions overcharged to consumers by hospital management from this illegal activity."

Earlier this year, the State Health Plan (Plan) submitted a public records request to UNC Health Care for a copy of its contract and fee schedule with Blue Cross Blue Shield North Carolina (Blue NC). Blue NC is the third party administrator for the state and negotiates pricing for the Plan's 727,000 members.

In response, UNC Healthcare provided more than 200 pages of redacted information with no pricing. The state-owned hospital said that pricing information was confidential between Blue NC and itself. Treasurer Folwell responded with a press release highlighting the absurdity of this response.

"The taxpayers need to understand that even the state treasurer cannot find out from the state hospital what the State Health Plan is paying for medical services for state workers," said Folwell. "It's beyond absurd."

In order to begin reducing medical costs and to provide price transparency for its members, the Plan announced has launched a new medical provider reimbursement strategy using referenced-based pricing based on published government rates. The hospital association has vehemently opposed any transparency in pricing and has gone to the North Carolina General Assembly to immediately stop the Plan's initiative to reduce costs and increase transparency.

Commented [FL1]: Insert links



## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 12:52 PM  
**To:** dalefolwell@gmail.com  
**Subject:** FW: Treasurer Folwell Comments on DOJ/Atrium Settlement

### Dale R. Folwell, CPA

NC State Treasurer  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
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STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Press

**Sent:** Monday, November 26, 2018 12:42 PM

**To:** 'alamancenews@mail.com' <alamancenews@mail.com>; 'grobertson@ap.org' <grobertson@ap.org>; 'aprleigh@ap.org' <aprleigh@ap.org>; 'mwaggoner@ap.org' <mwaggoner@ap.org>; 'sforeman@ap.org' <sforeman@ap.org>; 'tom.mayer@mountaintimes.com' <tom.mayer@mountaintimes.com>; 'colin.tate@mountaintimes.com' <colin.tate@mountaintimes.com>; 'ian.taylor@mountaintimes.com' <ian.taylor@mountaintimes.com>; 'luke.weir@mountaintimes.com' <luke.weir@mountaintimes.com>; 'racriscoe@courier-tribune.com' <racriscoe@courier-tribune.com>; 'ajordan@courier-tribune.com' <ajordan@courier-tribune.com>; 'jdwalker@courier-tribune.com' <jdwalker@courier-tribune.com>; 'jbiggs@courier-tribune.com' <jbiggs@courier-tribune.com>; 'MBarrett@CITIZEN-TIMES.com' <MBarrett@CITIZEN-TIMES.com>; 'cblake@citizen-times.com' <cblake@citizen-times.com>; 'bponder@citizentimes.com' <bponder@citizentimes.com>; 'jburgess@citizen-times.com' <jburgess@citizen-times.com>; 'dwdavis@citizen-times.com' <dwdavis@citizen-times.com>; 'jbowman@citizen-times.com' <jbowman@citizen-times.com>; 'editor@thetribunepapers.com' <editor@thetribunepapers.com>; 'editor@averyjournal.com' <editor@averyjournal.com>; 'news@averyjournal.com' <news@averyjournal.com>; 'paul@blackmountainnews.com' <paul@blackmountainnews.com>; 'news@blackmountainnews.com' <news@blackmountainnews.com>; 'anna.oakes@wataugademocrat.com' <anna.oakes@wataugademocrat.com>; 'mabernethy@thetimesnews.com' <mabernethy@thetimesnews.com>; 'bcresenzo@thetimesnews.com' <bcresenzo@thetimesnews.com>; 'rich.jackson@thetimesnews.com' <rich.jackson@thetimesnews.com>; 'dmildenberg@businessnc.com' <dmildenberg@businessnc.com>; 'chris.william@wellsfargoadvisors.com' <chris.william@wellsfargoadvisors.com>; 'dway@carolinajournal.com' <dway@carolinajournal.com>; 'rhenderson@carolinajournal.com' <rhenderson@carolinajournal.com>; 'cashmichaels@yahoo.com' <cashmichaels@yahoo.com>; 'jackie@thenewstimes.com' <jackie@thenewstimes.com>;

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**Subject:** Treasurer Folwell Comments on DOJ/Atrium Settlement



**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER

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FOR IMMEDIATE RELEASE

November 26, 2018

Contact: Frank Lester

919-814-3811

**Treasurer Folwell Calls for US Department of Justice to Recover Hundreds of Millions  
Potentially owed to NC Taxpayers from Hospitals' Anti-Competitive Activities and to Enforce  
Transparency in Pricing**

*Calls for Pricing Transparency from all North Carolina Hospitals*

(Raleigh, N.C.) – State Treasurer Dale R. Folwell, CPA, today called for the United States Department of Justice to take action and for all North Carolina hospitals to be transparent in their pricing. The announcement was made in light of the recent settlement of a lawsuit filed by the United States Department of Justice and the North Carolina Department of Justice against Atrium Health, formerly known as Carolinas Healthcare System.

The civil antitrust lawsuit challenged provisions in Atrium's contracts with major health insurers including Blue Cross and Blue Shield of North Carolina (Blue Cross NC) that prohibited what otherwise would have been used to direct consumers towards high quality, cost-effective health care providers.

"For decades, the largest public hospital system in North Carolina has been engaging in this and other anti-competitive activities," said Treasurer Folwell. "In the spirit of this settlement, I'm calling on all North Carolina hospitals to be transparent and to publish their pricing so consumers can make informed decisions regarding health care. I'm also calling for the United States Department of Justice and the North Carolina Department of Justice, on behalf of the State Health Plan, to recover the potentially hundreds of millions overcharged to consumers by hospital management from this illegal activity."

Earlier this year, the State Health Plan (Plan) submitted a public records request to UNC Health Care for a copy of its contract and fee schedule with Blue Cross NC. Blue Cross NC is the third party administrator for the Plan and negotiates pricing for the Plan's 727,000 members.

In response, UNC Health Care provided more than 100 pages of redacted information with no visible prices. The state-owned hospital said that pricing information between Blue Cross NC and itself is confidential. Treasurer Folwell responded with a press release highlighting its absurdity.

"The taxpayers need to understand that the state treasurer cannot find out from the state hospital what the State Health Plan is paying for medical services for state workers," said Folwell. "It's beyond belief."

## Anna Yount

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**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 1:03 PM  
**To:** Marni Jameson  
**Subject:** RE: Marni, David is in CLT, editor of Business NC(the premier statewide publication) and would like to meet with you on this trip...

test

### Dale R. Folwell, CPA

NC State Treasurer  
Office of the State Treasurer  
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NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Marni Jameson [mailto:marni@aid-us.org]  
**Sent:** Wednesday, November 14, 2018 5:19 PM  
**To:** 'David Mildenberg' <dmildenberg@businessnc.com>  
**Cc:** Dale Folwell <Dale@Nctreasurer.com>  
**Subject:** RE: Marni, David is in CLT, editor of Business NC(the premier statewide publication) and would like to meet with you on this trip...

Hi Dave,

Sounds good. How about if I call you when I'm done with my meetings at Tryon? I will be in Southpark, at 5950 Fairview Rd., corner of Park South Road. Perhaps we can arrange to meet near there?

*Marni Jameson Carey*

Executive Director  
407-571-9316

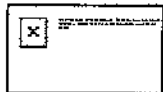


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*Marni Jameson Carey*

Executive Director

407-571-9316



[www.aid-us.org](http://www.aid-us.org)

**From:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>

**Sent:** Wednesday, November 14, 2018 3:55 PM

**To:** [marni@aid-us.org](mailto:marni@aid-us.org); [dmildenberg@businessnc.com](mailto:dmildenberg@businessnc.com)

**Subject:** Marni, David is in CLT, editor of Business NC(the premier statewide publication) and would like to meet with you on this trip...

**Dale R. Folwell, CPA**  
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## Anna Yount

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**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 1:04 PM  
**To:** Marni Jameson  
**Subject:** FW: Treasurer Folwell Comments on DOJ/Atrium Settlement

### Dale R. Folwell, CPA

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NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Press

**Sent:** Monday, November 26, 2018 12:42 PM

**To:** 'alamancenews@mail.com' <alamancenews@mail.com>; 'grobertson@ap.org' <grobertson@ap.org>; 'apraleigh@ap.org' <apraleigh@ap.org>; 'mwaggoner@ap.org' <mwaggoner@ap.org>; 'sforeman@ap.org' <sforeman@ap.org>; 'tom.mayer@mountaintimes.com' <tom.mayer@mountaintimes.com>; 'colin.tate@mountaintimes.com' <colin.tate@mountaintimes.com>; 'ian.taylor@mountaintimes.com' <ian.taylor@mountaintimes.com>; 'luke.weir@mountaintimes.com' <luke.weir@mountaintimes.com>; 'racriscoe@courier-tribune.com' <racriscoe@courier-tribune.com>; 'ajordan@courier-tribune.com' <ajordan@courier-tribune.com>; 'jdwalker@courier-tribune.com' <jdwalker@courier-tribune.com>; 'jbiggs@courier-tribune.com' <jbiggs@courier-tribune.com>; 'MBarrett@CITIZEN-TIMES.com' <MBarrett@CITIZEN-TIMES.com>; 'cblake@citizen-times.com' <cblake@citizen-times.com>; 'bponder@citizentimes.com' <bponder@citizentimes.com>; 'jburgess@citizen-times.com' <jburgess@citizen-times.com>; 'dwdavis@citizen-times.com' <dwdavis@citizen-times.com>; 'jbowman@citizen-times.com' <jbowman@citizen-times.com>; 'editor@thetribunepapers.com' <editor@thetribunepapers.com>; 'editor@averyjournal.com' <editor@averyjournal.com>; 'news@averyjournal.com' <news@averyjournal.com>; 'paul@blackmountainnews.com' <paul@blackmountainnews.com>; 'news@blackmountainnews.com' <news@blackmountainnews.com>; 'anna.oakes@wataugademocrat.com' <anna.oakes@wataugademocrat.com>; 'mabernethy@thetimesnews.com' <mabernethy@thetimesnews.com>; 'bcresenzo@thetimesnews.com' <bcresenzo@thetimesnews.com>; 'rich.jackson@thetimesnews.com' <rich.jackson@thetimesnews.com>; 'dmildenberg@businessnc.com' <dmildenberg@businessnc.com>; 'chris.william@wellsfargoadvisors.com' <chris.william@wellsfargoadvisors.com>; 'dway@carolinajournal.com' <dway@carolinajournal.com>; 'rhenderson@carolinajournal.com' <rhenderson@carolinajournal.com>; 'cashmichaels@yahoo.com' <cashmichaels@yahoo.com>; 'jackie@thenewstimes.com' <jackie@thenewstimes.com>;

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**Subject:** Treasurer Folwell Comments on DOJ/Atrium Settlement



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FOR IMMEDIATE RELEASE

November 26, 2018

Contact: Frank Lester

919-814-3811

**Treasurer Folwell Calls for US Department of Justice to Recover Hundreds of Millions Potentially owed to NC Taxpayers from Hospitals' Anti-Competitive Activities and to Enforce Transparency in Pricing**

*Calls for Pricing Transparency from all North Carolina Hospitals*

(Raleigh, N.C.) – State Treasurer Dale R. Folwell, CPA, today called for the United States Department of Justice to take action and for all North Carolina hospitals to be transparent in their pricing. The announcement was made in light of the recent settlement of a lawsuit filed by the United States Department of Justice and the North Carolina Department of Justice against Atrium Health, formerly known as Carolinas Healthcare System.

The civil antitrust lawsuit challenged provisions in Atrium's contracts with major health insurers including Blue Cross and Blue Shield of North Carolina (Blue Cross NC) that prohibited what otherwise would have been used to direct consumers towards high quality, cost-effective health care providers.

"For decades, the largest public hospital system in North Carolina has been engaging in this and other anti-competitive activities," said Treasurer Folwell. "In the spirit of this settlement, I'm calling on all North Carolina hospitals to be transparent and to publish their pricing so consumers can make informed decisions regarding health care. I'm also calling for the United States Department of Justice and the North Carolina Department of Justice, on behalf of the State Health Plan, to recover the potentially hundreds of millions overcharged to consumers by hospital management from this illegal activity."

Earlier this year, the State Health Plan (Plan) submitted a public records request to UNC Health Care for a copy of its contract and fee schedule with Blue Cross NC. Blue Cross NC is the third party administrator for the Plan and negotiates pricing for the Plan's 727,000 members.

In response, UNC Health Care provided more than 100 pages of redacted information with no visible prices. The state-owned hospital said that pricing information between Blue Cross NC and itself is confidential. Treasurer Folwell responded with a press release highlighting its absurdity.

"The taxpayers need to understand that the state treasurer cannot find out from the state hospital what the State Health Plan is paying for medical services for state workers," said Folwell. "It's beyond belief."

## Anna Yount

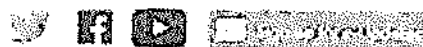
---

**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 1:04 PM  
**To:** Nochsner@wbtv.com  
**Subject:** FW: Treasurer Folwell Comments on DOJ/Atrium Settlement

### Dale R. Folwell, CPA

NC State Treasurer  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)



NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Press

**Sent:** Monday, November 26, 2018 12:42 PM

**To:** 'alamancenews@mail.com' <alamancenews@mail.com>; 'grobertson@ap.org' <grobertson@ap.org>; 'apraleigh@ap.org' <apraleigh@ap.org>; 'mwaggoner@ap.org' <mwaggoner@ap.org>; 'sforeman@ap.org' <sforeman@ap.org>; 'tom.mayer@mountaintimes.com' <tom.mayer@mountaintimes.com>; 'colin.tate@mountaintimes.com' <colin.tate@mountaintimes.com>; 'ian.taylor@mountaintimes.com' <ian.taylor@mountaintimes.com>; 'luke.weir@mountaintimes.com' <luke.weir@mountaintimes.com>; 'racriscoe@courier-tribune.com' <racriscoe@courier-tribune.com>; 'ajordan@courier-tribune.com' <ajordan@courier-tribune.com>; 'jdwalker@courier-tribune.com' <jdwalker@courier-tribune.com>; 'jbiggs@courier-tribune.com' <jbiggs@courier-tribune.com>; 'MBarrett@CITIZEN-TIMES.com' <MBarrett@CITIZEN-TIMES.com>; 'cblake@citizen-times.com' <cblake@citizen-times.com>; 'bponder@citizentimes.com' <bponder@citizentimes.com>; 'jburgess@citizen-times.com' <jburgess@citizen-times.com>; 'dwdavis@citizen-times.com' <dwdavis@citizen-times.com>; 'jbowman@citizen-times.com' <jbowman@citizen-times.com>; 'editor@thetribunepapers.com' <editor@thetribunepapers.com>; 'editor@averyjournal.com' <editor@averyjournal.com>; 'news@averyjournal.com' <news@averyjournal.com>; 'paul@blackmountainnews.com' <paul@blackmountainnews.com>; 'news@blackmountainnews.com' <news@blackmountainnews.com>; 'anna.oakes@wataugademocrat.com' <anna.oakes@wataugademocrat.com>; 'mabernethy@thetimesnews.com' <mabernethy@thetimesnews.com>; 'bcresenzo@thetimesnews.com' <bcresenzo@thetimesnews.com>; 'rich.jackson@thetimesnews.com' <rich.jackson@thetimesnews.com>; 'dmildenberg@businessnc.com' <dmildenberg@businessnc.com>; 'chris.william@wellsfargoadvisors.com' <chris.william@wellsfargoadvisors.com>; 'dway@carolinajournal.com' <dway@carolinajournal.com>; 'rhenderson@carolinajournal.com' <rhenderson@carolinajournal.com>; 'cashmichaels@yahoo.com' <cashmichaels@yahoo.com>; 'jackie@thenewstimes.com' <jackie@thenewstimes.com>;

'jpembrick@laurinburgexchange.com' <jpembrick@laurinburgexchange.com>; 'cerhardt@lpnc.org'  
 <cerhardt@lpnc.org>; 'info@lpnc.org' <info@lpnc.org>; 'nconley@mcdowellnews.com'  
 <nconley@mcdowellnews.com>; 'editor@mitchellnews.com' <editor@mitchellnews.com>;  
 'reporter1@mitchellnews.com' <reporter1@mitchellnews.com>; 'dibach@statesville.com' <dibach@statesville.com>;  
 'lwall@morganton.com' <lwall@morganton.com>; 'tom.mayer@mountaintimes.com'  
 <tom.mayer@mountaintimes.com>; 'news@mountainx.com' <news@mountainx.com>; 'cmorrisroe@mountainx.com'  
 <cmorrisroe@mountainx.com>; 'publisher@mountainx.com' <publisher@mountainx.com>; 'tjoyce@civitasmedia.com'  
 <tjoyce@civitasmedia.com>; 'jlinville@civitasmedia.com' <jlinville@civitasmedia.com>; 'erika.edwards@nbcuni.com'  
 <erika.edwards@nbcuni.com>; 'greg.kohler@nbcuni.com' <greg.kohler@nbcuni.com>; 'jen.croteau@nbcuni.com'  
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 <beta@ncbeaches.com>; 'brian.balfoul@nccivitas.org' <brian.balfoul@nccivitas.org>; 'communications@ncgop.org'  
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 <communications@ncgop.org>; 'rose.hoban@gmail.com' <rose.hoban@gmail.com>; 'mark@flyingcar.cc'  
 <mark@flyingcar.cc>; 'lhorsch@ncinsider.com' <lhorsch@ncinsider.com>; 'BFerrell@ncnn.com' <BFerrell@ncnn.com>;  
 'newsroom@ncnn.com' <newsroom@ncnn.com>; 'phil@ncpress.com' <phil@ncpress.com>;  
 'tomcamp@carolinabroadcasting.com' <tomcamp@carolinabroadcasting.com>; 'roberthoward@ncdemocraticparty.org'  
 <roberthoward@ncdemocraticparty.org>; 'Eddie.Fitzgerald@newbernsj.com' <Eddie.Fitzgerald@newbernsj.com>;  
 'sjnewsroom@newbernsj.com' <sjnewsroom@newbernsj.com>; 'cal.bryant@r-cnews.com' <cal.bryant@r-cnews.com>;  
 'gene.motley@r-cnews.com' <gene.motley@r-cnews.com>; 'Holly.Taylor@r-cnews.com' <Holly.Taylor@r-cnews.com>;  
 'info@nsjonline.com' <info@nsjonline.com>; 'emily@northstatemedia.com' <emily@northstatemedia.com>;  
 'cory.lavalette@nsjonline.com' <cory.lavalette@nsjonline.com>; 'neel@obsentinel.com' <neel@obsentinel.com>;  
 'info@outerbanksvoice.com' <info@outerbanksvoice.com>; 'r.rao@pageantmedia.com' <r.rao@pageantmedia.com>;  
 'hbradford@pionline.com' <hbradford@pionline.com>; 'thepiloteditor@gmail.com' <thepiloteditor@gmail.com>;  
 'mkmurphy@thepilot.com' <mkmurphy@thepilot.com>; 'lauradouglass145@gmail.com'  
 <lauradouglass145@gmail.com>; 'news@portcitydaily.com' <news@portcitydaily.com>;  
 'Michael.p@localvoicemedia.com' <Michael.p@localvoicemedia.com>; 'vcrowder@publicradioeast.org'  
 <vcrowder@publicradioeast.org>; 'aromero@quepasamedia.com' <aromero@quepasamedia.com>;  
 'etupayachi@quepasamedia.com' <etupayachi@quepasamedia.com>; 'icruz@quepasamedia.com'  
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 courier.com' <johnnywhitfield@roxboro-courier.com>; 'josh.bergeron@salisburypost.com'  
 <josh.bergeron@salisburypost.com>; 'mwineka@salisburypost.com' <mwineka@salisburypost.com>;  
 'rebecca.rider@salisburypost.com' <rebecca.rider@salisburypost.com>; 'editor@sanfordherald.com'  
 <editor@sanfordherald.com>; 'logan@sanfordherald.com' <logan@sanfordherald.com>; 'zhorner@sanfordherald.com'  
 <zhorner@sanfordherald.com>; 'dturbyfill@shelbystar.com' <dturbyfill@shelbystar.com>;  
 'jessi@smokymountainnews.com' <jessi@smokymountainnews.com>; 'garret@smokymountainnews.com'  
 <garret@smokymountainnews.com>; 'cory@smokymountainnews.com' <cory@smokymountainnews.com>;  
 'holly@smokymountainnews.com' <holly@smokymountainnews.com>; 'centralncnews@charter.com'  
 <centralncnews@charter.com>; 'tim.boyum@charter.com' <tim.boyum@charter.com>; 'loretta.boniti@charter.com'  
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 <coastalncnews@charter.com>; 'triadnews@charter.com' <triadnews@charter.com>; 'bj@stanlynewspress.com'  
 <bj@stanlynewspress.com>; 'svlfreenews@gmail.com' <svlfreenews@gmail.com>; 'staylor@statesville.com'

<Brenda.Williams@nctreasurer.com>; Christopher Morris <Christopher.Morris@nctreasurer.com>; Jeff Smith <Jeff.S.Smith@nctreasurer.com>; Cindy Aiken <Cindy.Aiken@nctreasurer.com>; Dee Jones <Dee.Jones@nctreasurer.com>; Dale Folwell <Dale@Nctreasurer.com>; Sam Hayes <Sam.Hayes@nctreasurer.com>; Edgar Starnes <Edgar.Starnes@nctreasurer.com>; Sharon Edmundson <Sharon.Edmundson@nctreasurer.com>; Powell Baggett <Powell.Baggett@nctreasurer.com>

**Subject:** Treasurer Folwell Comments on DOJ/Atrium Settlement



**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER

STATE  
DA  
/

FOR IMMEDIATE RELEASE

November 26, 2018

Contact: Frank Lester

919-814-3811

## **Treasurer Folwell Calls for US Department of Justice to Recover Hundreds of Millions Potentially owed to NC Taxpayers from Hospitals' Anti-Competitive Activities and to Enforce Transparency in Pricing**

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**Anna Yount**

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**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 1:13 PM  
**To:** Frank Lester  
**Subject:** FW: Riddick  
**Attachments:** Petition with PJR attached as exhibit.pdf; PJR.pdf

Please forward to Paul Specht @ N/O

**Dale R. Folwell, CPA**

*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)



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**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Sam Hayes  
**Sent:** Monday, November 26, 2018 11:34 AM  
**To:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>; Chris Farr <[Chris.Farr@nctreasurer.com](mailto:Chris.Farr@nctreasurer.com)>; Frank Lester <[Frank.Lester@nctreasurer.com](mailto:Frank.Lester@nctreasurer.com)>; Steve Toole <[Steve.Toole@nctreasurer.com](mailto:Steve.Toole@nctreasurer.com)>  
**Subject:** FW: Riddick

See attached.

Thanks.

**From:** Newsome, Joseph [<mailto:jnewsome@ncdoj.gov>]  
**Sent:** Monday, November 26, 2018 11:29 AM  
**To:** Sam Hayes <[Sam.Hayes@nctreasurer.com](mailto:Sam.Hayes@nctreasurer.com)>; Christina Strickland <[christina.strickland@nctreasurer.com](mailto:christina.strickland@nctreasurer.com)>  
**Subject:** Riddick

FYI... Don't know if you have seen them yet, but Laura Riddick's attorneys have filed both a PJR in Superior Court and a Petition in OAH.

I'm attaching copies of both.

PLEASE PRINT CLEARLY OR TYPE

STATE OF NORTH CAROLINA

FILED

IN THE OFFICE OF  
ADMINISTRATIVE HEARINGS

COUNTY OF (1) WAKE

(2) LAURA M. RIDDICK

2018 NOV 20 PM 2:15

18 DST 0711 33

PETITIONER,

v.

OFFICE OF ADMIN HEARINGS

PETITION  
FOR A  
CONTESTED CASE HEARING

(3) DEPARTMENT OF STATE TREASURER, Retirement Systems  
Division; DALE FOLWELL, State Treasurer (in official capacity  
only); STEVEN C. TOOLE, Director, Retirement Systems Division  
(in official capacity only); NORTH CAROLINA RETIREMENT  
SYSTEM COMMISSION BOARD OF TRUSTEES (in official  
capacity only),

RESPONDENT.

I hereby ask for a contested case hearing as provided for by North Carolina General Statute § 150B-23 because the Respondent has:

(Briefly state facts showing how you believe you have been harmed by the State agency or board.)

See attached Petition for Judicial Review, the factual allegations contained therein are incorporated by reference

(4) Amount in controversy \$126,290.28 and ongoing amounts Petitioner is deprived of (if applicable)

(If more space is needed, attach additional pages.)

(5) Because of these facts, the State agency or board has: (check at least one from each column)

☒ X deprived me of property;

☐ ordered me to pay a fine or civil penalty; or

☒ X otherwise substantially prejudiced my rights;

AND

☒ X exceeded its authority or jurisdiction;

☒ X acted erroneously;

☐ failed to use proper procedure;

☒ X acted arbitrarily or capriciously; or

☒ X failed to act as required by law or rule.

(6) Date: 11/19/2018

(7) Your phone number: (919) 521-5878

(8) Print your full address: 115 1/2 West Morgan Street

Raleigh NC 27601

(street address/p.o. box)

(city) (state) (zip)

(9) Print your name: Joseph E. Zeszotarski, Jr.

(10) Your signature: [Signature]

You must mail or deliver a COPY of this Petition to the State agency or board named on line (3) of this form. You should contact the agency or board to determine the name of the person to be served.

### CERTIFICATE OF SERVICE

I certify that this Petition has been served on the State agency or board named below by depositing a copy of it with the United States Postal Service with sufficient postage affixed OR by delivering it to the named agency or board:

(11) Sam Hayes

(name of person served)

(12) NC Dept. of State Treasurer

(State agency or board listed on line 3)

(13) 3200 Atlantic Avenue

(street address/p.o. box)

Raleigh

(city)

NC

(state)

27604

(zip code)

(14) This the 20 day of November, 2018.

(15) [Signature]  
(your signature)

When you have completed this form, you MUST mail or deliver the ORIGINAL to the Office of Administrative Hearings, 6714 Mail Service Center, Raleigh, NC 27699-6700.

11/20/18  
OK # 9340  
20.00  
m. mark  
} [Signature]



**INSTRUCTIONS FOR FORM H-06**  
**"PETITION FOR A CONTESTED CASE" AND "CERTIFICATE OF SERVICE"**

**FILL IN BLANKS:**

Fill in your county of residence (1), print your name on line (2), and the name of the agency or board about which you are complaining on line (3). Be sure to briefly state the facts about your case. Enter the dollar amount in controversy, if applicable on line (4). Check all of the items that apply in section (5). Enter the date on line (6), your telephone number on line (7), your address on line (8), print your name on line (9), and **sign your name on line (10).**

**CERTIFICATE OF SERVICE:**

You must mail or deliver a copy of your completed petition to the agency or board named on line (3) and complete the "certificate of service" section on your petition, entering the name of the person to whom you mailed or delivered the petition on line (11). You should contact the agency or board to determine the name of the person to be served. Print the name of the state agency involved on line (12), the address of the agency or board on line (13), the date on line (14), and **sign your name on line (15).**

**FILING FEE**

Filing fees can be paid by either, cash, money order, certified check or checks drawn on attorney trust accounts. The fee must be paid at the time the petition is filed. Checks should be made payable to the Office of Administrative Hearings. If your case is involving a mandated federal cause of action there is no fee. The filing fee for Certificate of Need cases is \$125.00 as well as Environmental issues concerning Clean Water Act permitting, Clean Air Act permitting, Animal Waste Management System permitting, and permitting for water use within capacity use areas and any case when the amount in controversy is \$50,000.00 or more. All other case types shall pay \$20.00.

**FILING YOUR PETITION WITH THE OFFICE OF ADMINISTRATIVE HEARINGS:**

Your contested case will commence as soon as you file your completed original petition, properly signed and appropriate fee paid, with the Office of Administrative Hearings. Below are the mailing and physical addresses:

**Office of Administrative Hearings**  
**6714 Mail Service Center**  
**Raleigh, NC 27699-6700**

**Office of Administrative Hearings**  
**1711 New Hope Church Road**  
**Raleigh, NC 27609-6285**

If you mail this form, the case commences when it is received and filed in this office.

You may file your petition by fax during normal business hours by faxing the petition to the Clerk's Office at (919) 431-3100.

You may file your petition by electronic mail by an attached file either in PDF format or a document that is compatible with or convertible to the most recent version of Word for Windows by sending the electronic transmission to [oah.clerks@oah.nc.gov](mailto:oah.clerks@oah.nc.gov). Electronic mail without attached file shall not constitute a valid filing.

### GENERAL NATURE OF THE ACTION

1. On October 9, 2018, petitioner Laura M. Riddick requested Steven C. Toole (Toole), Director, Retirement Systems Division of TSERS, LGERS and RODSPF to issue a declaratory ruling pursuant to G.S. 150B-4 and 20 N.C. Administrative Code 01F.0201. The requested ruling would declare that the basis for terminating the payment of Petitioner's state retirement system pension to her and for demanding a repayment of all benefits received by Petitioner since her retirement as Register of Deeds for Wake County, N.C. on April 1, 2017 (as set forth in a letter dated September 25, 2018 sent by Toole to Petitioner and attached as Exhibit A) were in violation of the laws of North Carolina. As set forth in Exhibit C, Toole denied Petitioner's request for a declaratory ruling. By virtue of the letters set forth in Exhibit A and Exhibit C, Petitioner is an aggrieved party and entitled to appeal the denial of her request for a declaratory ruling immediately to Superior Court.

### PARTIES

2. Petitioner Laura M. Riddick is a citizen and resident of Wake County, N.C.; is retired from the elected office of Register of Deeds for Wake County, N.C.; and is a member of LGERS and previously a member of TSERS, retiring under LGERS on March 31, 2017 and began drawing a retirement pension under LGERS and a supplemental pension benefit under RODSPF.
3. Petitioner Laura M. Riddick is a "person aggrieved" within the meaning of G.S. 150B-2(6) in that she has been affected substantially by the respondent Toole's decision to deny the declaratory ruling requested. The retirement

Retirement System". Also, the BOT has the statutory authority to determine rights of a participant in the retirement systems pursuant to various statutes including G.S. 128-38.4A.

#### JURISDICTION AND VENUE

9. The denial of a request for declaratory ruling is a final agency decision subject to judicial review pursuant to G.S. 150B-4(1). Jurisdiction and venue is proper in Wake County Superior Court in that Petitioner is a citizen and resident of Wake County and G.S. 150B-45(a)(2) provides that a petition for judicial review is to be filed in the superior court of the county where the person aggrieved by the final decision resides.

#### FACTS

10. Petitioner, Laura M. Riddick was employed by the North Carolina Department of Cultural Resources from October 8, 1990 through November 30, 1996 and was a participating member of TSERS.
11. At the time of leaving the employment of the Department of Cultural Resources, Petitioner had accrued 6 years and 2 months of membership service in TSERS.
12. Having been elected by the citizens of Wake County, N.C. in November of 1996 as Register of Deeds, Petitioner began service as an elected official on December 1, 1996 for a four-year term and as a member of LGERS.
13. Subsequently, Petitioner was re-elected as Wake County Register of Deeds in 2000, 2004, 2008, 2012, and 2016, and continued as a member of LGERS.

term of 84 months imprisonment and was ordered to pay restitution in the amount \$926,615.00 in full at the time of entry of judgment. No aggravating factors were found by the court at sentencing.

22. Petitioner paid the \$926,615.00 in restitution on August 24, 2018 and began serving her prison sentence at the N.C. Correctional Prison for Women where she continues to be imprisoned.
23. A copy of the "Judgment and Commitment Active Punishment – Felony (Structured Sentencing)" is attached as Exhibit D.

#### RELEVANT STATUTES

24. G.S. 128-38.4A is captioned "Forfeiture of retirement benefits for certain felonies related to employment or holding office."; was ratified by the General Assembly on June 28, 2012; and became effective December 1, 2012.
25. In his letter of September 25, 2018 (Exhibit A), Respondent Toole relied on G.S. 128-38.4A as the operative statute for concluding that Petitioner Riddick was subject to the loss of "credible service that accrued after December 1, 2012" called for in G.S. 128-26(x).
26. G.S. 128-38.4 is captioned "Forfeiture of retirement benefits for certain felonies committed while serving as an elected official."
27. G.S. 128-38.4 states: that retirement benefits shall not be paid to any member "who is convicted of any felony under...the laws of this State listed in subsection (c) of this section if all of the following apply: (2) The conduct on which the ...State offense is committed is directly related to the member's service as an elected government official."

the LGERS at that time, "shall have the right to receive a monthly pension" under RODSPF upon retirement with LGERS.

35. Petitioner had over 10 years of service as a Register of Deeds when she retired under LGERS on April 1, 2017.
36. G.S. 128-26A is captioned: "Reciprocity of creditable service with other State-administered retirement systems." Subsection (a) states in pertinent part: "Only for the purpose of determining eligibility for benefits accruing under this Article, creditable service standing to the credit of a member of...the Teachers' and State Employees' Retirement System shall be added to the creditable service standing to the credit of a member of this System."
37. Petitioner as previously alleged above had accrued 6 years and 2 months of creditable service in TSERS while an employee of the North Carolina Department of Cultural Resources from October 8, 1990 through November 30, 1996 and transferred that accrued creditable service time to LGERS pursuant to the authority of G.S. 128-26A.
38. G.S. 128-26(e) includes in relevant part: "...Creditable service for unused sick leave shall be allowed only for sick leave accrued monthly during employment under a duly adopted sick leave policy....".
39. Petitioner pursuant to G.S. 128-26(e) gained 2 years and 7 months of accrued unused sick leave added to her previously accumulated creditable service upon her retirement.

2017 while serving as Register of Deeds because G.S. 128-38.4A does not apply to Petitioner.

44. Petitioner excepts to the determination of Respondent Toole that Petitioner is no longer entitled to 6 years and 2 months of accrued creditable service toward retirement arising out of her employment in the Department of Cultural Resources from October 8, 1990 to November 30, 1996 based upon her transfer of those benefits from TSERS to LGERS at the time of her retirement because those years of service were accrued in a different system prior to her participation in LGERS and G.S. 128-38A does not apply to Petitioner's service during that time period and Petitioner was not an elected official or an employee of an elected official during that time period.
45. Petitioner excepts to the determination of Respondent Toole that Petitioner is no longer entitled to 2 years and 7 months of accrued creditable service toward retirement arising out of accrued and unused sick leave because G.S. 128-38.4A does not apply to Petitioner's accrued and unused sick leave time.
46. Petitioner excepts to the determination of Respondent Toole that Petitioner did not have sufficient accrued creditable time to retire on March 31, 2017 in that the determination is based upon the erroneous and illegal calculations set forth above as to Petitioner's accrued creditable service time toward retirement.
47. Petitioner excepts to the determination of Respondent Toole that Petitioner owes \$126,290.28 in retirement benefits overpayments based upon the erroneous and illegal calculations set forth above.

## GROUNDS FOR REVERSAL

The decision of Respondent Toole is purely a question of law and statutory interpretation and is affected by error of law. The conclusions by Respondent Toole interpreting and applying the statutes in question to deprive Petitioner of her vested rights to accrued creditable service in the North Carolina Retirement System and to determine that Petitioner was not eligible to retire on March 31, 2017 and thus owes the Retirement System a refund of benefits paid beginning April 1, 2017 is incorrect as a matter of law.

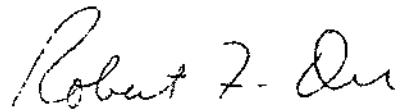
## RELIEF REQUESTED

Having stated her exceptions to Respondents' final agency decision and grounds for reversal, Petitioner asks that this Court reverse the November 2, 2018 final agency decision of Respondent Toole denying Petitioner's request pursuant to G.S. 150B-4 and 150B-45 for a Declaratory Ruling, and provide Petitioner with the following relief:

1. Declare that G.S. 128-38.4A as relied on by Respondents does not apply to Petitioner and that the Respondents cannot deprive Petitioner of accrued creditable service toward retirement from December 1, 2012 through March 31, 2017;
2. Declare that Respondents have no statutory or regulatory authority to deprive Petitioner of accrued creditable service earned under TSERS and transferred pursuant to statutory authority to LGERS;

This the 20 day of November, 2018.

ROBERT F. ORR  
ATTORNEY AT LAW



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Robert F. Orr  
N.C. State Bar No. 6798  
3434 Edwards Mill Road  
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Raleigh, NC 27612  
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GAMMON, HOWARD &  
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---

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Counsel for Petitioner



18CV014244

STATE OF NORTH CAROLINA IN THE GENERAL COURT OF JUSTICE  
WAKE COUNTY SUPERIOR COURT DIVISION

FILE NO: 18CV014244

LAURA M. RIDDICK,  
Petitioner,

v.

PETITION FOR JUDICIAL  
REVIEW  
(Denial of Request for Declaratory  
Ruling)

DEPARTMENT OF STATE  
TREASURER, Retirement  
Systems Division; DALE  
FOLWELL, State Treasurer (in  
official capacity only); STEVEN  
C. TOOLE, Director, Retirement  
Systems Division (in official  
capacity only); NORTH  
CAROLINA RETIREMENT  
SYSTEM COMMISSION  
BOARD OF TRUSTEES (in  
official capacity only),

Respondents.

Pursuant to North Carolina General Statutes §§ 150B-4 and -45, Laura M. Riddick petitions the court for judicial review of the November 2, 2018 decision of Steven C. Toole, Director, Retirement Systems Division, Teachers' and State Employees' Retirement System (TSERS), Local Governmental Employees' Retirement System (LGERS) and Register of Deeds Supplemental Pension Fund (RODSPF) denying Ms. Riddick's request for a declaratory ruling. The request for a declaratory ruling is attached as Exhibit B and the November 2, 2018 letter in response from Mr. Toole denying the request is attached as Exhibit C.

system, through Respondents, has terminated the payment of Petitioner's retirement benefits to her, claiming that she did not have enough accrued years to retire on March 31, 2017 and has demanded the repayment of \$126,290.28 in overpayments made to her by LGERS and RODSPF since her retirement on March 31, 2017. The termination of Petitioner's retirement benefits is unlawful as is the claimed overpayments demand and in violation of Petitioner's rights under the laws of North Carolina as contended by petitioner in her declaratory ruling request and under the North Carolina Constitution.

4. Respondent Steven Toole is the Executive Director of the Retirement Systems at issue in this case including LGERS AND TSERS as well as the Register of Deeds Supplemental Pension Fund (RODSPF) and is the official to whom the request for declaratory ruling was addressed and by whom it was denied.
5. The Retirement Systems Division in the Department of State Treasurer is the agency responsible for administration of LGERS, TSERS AND RODSPF.
6. The Department of State Treasurer is the state governmental entity established by the General Statutes of North Carolina under which the Retirement Systems Division is placed.
7. Dale Folwell is the duly elected Treasurer for the State of North Carolina and the administrative head of the Department of State Treasurer.
8. The North Carolina Retirement System Commission Board of Trustees (BOT) is a statutorily created body vested by the statutes of North Carolina with "the general administration and responsibility for the proper operation of the

14. On March 31, 2017, Petitioner retired as Wake County Register of Deeds having accrued 20 years and 4 months of creditable membership service in LGERS.
15. In March of 2017, Petitioner converted 2 years and 7 months of unused sick leave covering an extended time period of years of service as Register of Deeds to accrued creditable membership service time in LGERS.
16. In March of 2017, Petitioner transferred her previously accrued 6 years and 2 months of service time in TSERS to LGERS.
17. As a result of Petitioner's accrued membership service time from December 1, 1996 through March 31, 2017, Petitioner retired, effective April, 1, 2017 in LGERS with 29 years and 1 month of accrued service time and began drawing her pension.
18. Pursuant to state law, Petitioner while serving as Register of Deeds was entitled to and did contribute to and participate in the Register of Deeds Supplemental Pension Fund (RODSPF).
19. Upon Petitioner's retirement as Wake County Register of Deeds on March 31, 2017, Petitioner was entitled under state law to receive benefits from the RODSPF and did so.
20. On August 24, 2018, Petitioner plead guilty to 6 counts of G.S. 14-92, "Embezzlement by public officers and trustees", a class C felony, in Wake County Superior Court.
21. The Court consolidated all six counts for one judgement, and Petitioner was sentenced to a minimum term of 60 months imprisonment and a maximum

28. Those "certain felonies" specifically listed in G.S. 128-38.4 do not include G.S. 14-92 to which Petitioner plead guilty.
29. At the time of the offenses to which Petitioner plead guilty under G.S. 14-92, Petitioner was "an elected government official".
30. G.S. 128-38.4A upon which Respondents rely in this matter references "certain felonies" but lists no specific felonies, the only "certain felonies" being listed in G.S. 128-38.4.
31. Pursuant to G.S. 128-38.4A(a) in order for this statute to apply to a member "(2) The conduct resulting in the member's conviction is directly related to the member's office or employment." In G.S. 128-38-4A(b) it states: "Subdivision (2) of subsection (a) of this section shall apply to felony convictions where the court finds under G.S. 15A-1340.16(d)(9) or other applicable State or federal procedure that the member's conduct is directly related to the member's office or employment."
32. G.S. 15A-1340.16(d)(9) states in pertinent part: "Aggravating Factors" – The following are aggravating factors: ...(9) The defendant held public elected or appointed office or public employment at the time of the offense and the offense directly related to the conduct of the office or employment."
33. The Judgment and Commitment Order entered by Judge Ridgeway and attached as Exhibit D, has no aggravating factors listed or found.
34. G.S. 161-50.4(a)(1) is a statute requiring that a Register of Deeds with at least 10 years of eligible service but who does not commence retirement with

## EXCEPTIONS

40. Petitioner excepts to the November 2, 2018, decision of Respondent Toole as set forth in Exhibit C and each of the grounds, specifically set out or included in Respondent Toole's letter (Exhibit A), cited for the denial of Petitioner's Request for a Declaratory Ruling (Exhibit B).
41. Petitioner excepts to the determination made by Respondent Toole that Petitioner's was not entitled to credible service time toward retirement from December 1, 2012 through March 31, 2017 based upon the application of G.S. 128-38.4A to her in that (a) that statute is not applicable to Petitioner in that the offenses she plead guilty to are not covered by the statute; (b) even if the statute could be determined to apply to Petitioner the requisite finding by the Trial Court under G.S. 15A-1340.16(d)(9) was not made in the Judgment and Commitment (Exhibit D).
42. Petitioner excepts to the determination by Respondent Toole that says Petitioner is "no longer entitled to the service that was credited to her LGERS's account after December 1, 2012. Therefore pursuant... General Statutes §128-38.4A we have removed 13 years and 1 month (13.0833) of credible service from your LGERS's account for the period covering December 1, 2012 through March 31, 2017..." as more specifically set forth below in paragraphs 43 – 45.
43. Petitioner excepts to the determination of Respondent Toole that Petitioner is no longer entitled to 4 years and 4 months of creditable service toward retirement which she accumulated between December 1, 2012 and March 31,

48. Petitioner excepts to the determination of Respondent Toole that Petitioner is ineligible for retirement benefits under RODSPF based upon the erroneous and illegal determinations set forth above that Petitioner was ineligible to retire from LGERS on March 31, 2017.

#### CONTINGENT CONSTITUTIONAL VIOLATIONS

49. Petitioner contends that she is entitled to judgment in her favor based solely upon the statutory violations alleged in the preceding paragraphs. However, should a ruling be granted in favor of Respondents on any or all of the statutory grounds set forth above, Petitioner contends as set forth below that such statutory application violates her rights under the North Carolina Constitution as more fully described below.
50. The deprivation of Petitioner's retirement benefits as set forth in Exhibit A, constitutes an unlawful taking of her property rights in violation of the North Carolina Constitution, Article I, Section 19, "Law of the Land; equal protection of the laws."
51. The deprivation of Petitioner's retirement benefits as set forth in Exhibit A, constitutes the infliction of excessive fines imposed and cruel or unusual punishment inflicted, in violation of the North Carolina Constitution, Article I, Section 27 "Bail, fines, and punishments."
52. The deprivation of Petitioner's retirement benefits as set forth in Exhibit A, constitutes the Ex post facto use of the law punishing Petitioner, in violation of the North Carolina Constitution, Article I, Section 16, "Ex post fact laws."

3. Declare that Respondents have no statutory or regulatory authority to deprive Petitioner of accrued creditable service earned through the accrual of unused sick leave;
4. Declare that Respondents have no statutory or regulatory authority to conclude that Petitioner was ineligible to retire with sufficient accrued creditable service on March 31, 2017;
5. Declare that Respondents have no statutory or regulatory authority to conclude that Petitioner was ineligible to draw retirement benefits from RODSPF;
6. Declare that Respondents claim for \$126,290.28 is void in that Petitioner was legally retired as of April 1, 2017 and entitled to benefits paid to her;
7. Issue a Preliminary and Permanent Injunction requiring the Respondents to reinstate Petitioner's retirement benefits as legally calculated and for interest on the amounts improperly withheld upon payment of those benefits improperly withheld;
8. That the costs of this action be taxed against the Respondents;
9. That Petitioner be awarded her attorneys fees, as may be allowable by law; and
10. For such other and further relief as the Court may deem just and proper.

CERTIFICATE OF SERVICE

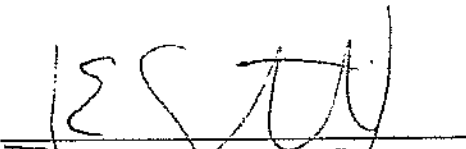
I hereby certify that I have this day served a copy of the foregoing PETITION FOR JUDICIAL REVIEW as follows:

Joseph Newsome  
Special Deputy Attorney General  
PO Box 629  
Raleigh, NC 27602-0629

Christina Morrow Strickland  
General Counsel for Retirement Systems Division  
3200 Atlantic Avenue  
Raleigh, NC 27604

Sam Hayes  
NC Department of State Treasurer  
3200 Atlantic Avenue  
Raleigh, NC 27604

This the 20<sup>th</sup> day of November, 2018.

  
\_\_\_\_\_  
Joseph E. Zeszotarski, Jr.  
Counsel for Petitioner



**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 1:16 PM  
**To:** Dale Owen  
**Subject:** RE: NC State Health Plan Provider Reimbursement Strategy Letter of Intent

test

**Dale R. Folwell, CPA**

*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)



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**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Dale Owen [mailto:dowen@tryonmed.com]  
**Sent:** Wednesday, October 17, 2018 6:25 PM  
**To:** Dee Jones <Dee.Jones@nctreasurer.com>  
**Cc:** Dale Folwell <Dale@Nctreasurer.com>  
**Subject:** Re: NC State Health Plan Provider Reimbursement Strategy Letter of Intent

Thank you very much for the information.  
Looking forward to our 11/30/18 meeting and helping the state employees.

Dale Owen

---

**From:** Dee Jones <Dee.Jones@nctreasurer.com>  
**Sent:** Wednesday, October 17, 2018 6:04:09 PM  
**To:** Dale Owen  
**Cc:** Dale Folwell; Dee Jones  
**Subject:** RE: NC State Health Plan Provider Reimbursement Strategy Letter of Intent

Dr. Owen,

Dr. Owen,

We very much enjoyed our call with you, Mr. Gage and Mr. Gill yesterday afternoon. It is energizing to talk with a Provider such as yourself who "gets it." We are encouraged by your boldness to walk away from Atrium and do what's right, much like what we are trying to do at the Plan.

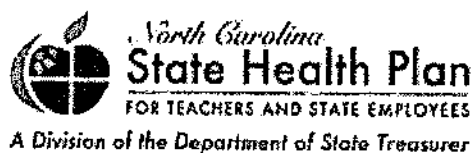
As promised, I am attaching a copy of the letter that was sent to all Providers under contract with the Plan. A hard copy will go into the mail later today. We are also working on the other request and will send when available.

Best,

**Dee Jones**

*Executive Director*  
State Health Plan  
Office: (919) 814-4407

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.SHPNC.org](http://www.SHPNC.org)



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## Anna Yount

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**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 1:17 PM  
**To:** Dale Owen  
**Subject:** FW: Treasurer Folwell Comments on DOJ/Atrium Settlement

### Dale R. Folwell, CPA

NC State Treasurer  
Office of the State Treasurer  
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NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Press

**Sent:** Monday, November 26, 2018 12:42 PM

**To:** 'alamancenews@mail.com' <alamancenews@mail.com>; 'grobertson@ap.org' <grobertson@ap.org>; 'aprleigh@ap.org' <aprleigh@ap.org>; 'mwaggoner@ap.org' <mwaggoner@ap.org>; 'sforeman@ap.org' <sforeman@ap.org>; 'tom.mayer@mountaintimes.com' <tom.mayer@mountaintimes.com>; 'colin.tate@mountaintimes.com' <colin.tate@mountaintimes.com>; 'ian.taylor@mountaintimes.com' <ian.taylor@mountaintimes.com>; 'luke.weir@mountaintimes.com' <luke.weir@mountaintimes.com>; 'racriscoe@courier-tribune.com' <racriscoe@courier-tribune.com>; 'ajordan@courier-tribune.com' <ajordan@courier-tribune.com>; 'jdwalker@courier-tribune.com' <jdwalker@courier-tribune.com>; 'jbiggs@courier-tribune.com' <jbiggs@courier-tribune.com>; 'MBarrett@CITIZEN-TIMES.com' <MBarrett@CITIZEN-TIMES.com>; 'cblake@citizen-times.com' <cblake@citizen-times.com>; 'bponder@citizentimes.com' <bponder@citizentimes.com>; 'jburgess@citizen-times.com' <jburgess@citizen-times.com>; 'dwdavis@citizen-times.com' <dwdavis@citizen-times.com>; 'jbowman@citizen-times.com' <jbowman@citizen-times.com>; 'editor@thetribunepapers.com' <editor@thetribunepapers.com>; 'editor@averyjournal.com' <editor@averyjournal.com>; 'news@averyjournal.com' <news@averyjournal.com>; 'paul@blackmountainnews.com' <paul@blackmountainnews.com>; 'news@blackmountainnews.com' <news@blackmountainnews.com>; 'anna.oakes@wataugademocrat.com' <anna.oakes@wataugademocrat.com>; 'mabernethy@thetimesnews.com' <mabernethy@thetimesnews.com>; 'bcresenzo@thetimesnews.com' <bcresenzo@thetimesnews.com>; 'rich.jackson@thetimesnews.com' <rich.jackson@thetimesnews.com>; 'dmildenberg@businessnc.com' <dmildenberg@businessnc.com>; 'chris.william@wellsfargoadvisors.com' <chris.william@wellsfargoadvisors.com>; 'dway@carolinajournal.com' <dway@carolinajournal.com>; 'rhenderson@carolinajournal.com' <rhenderson@carolinajournal.com>; 'cashmichaels@yahoo.com' <cashmichaels@yahoo.com>; 'jackie@thenewstimes.com' <jackie@thenewstimes.com>;

'jpembrick@laurinburgexchange.com' <jpembrick@laurinburgexchange.com>; 'cerhardt@lpnc.org' <cerhardt@lpnc.org>; 'info@lpnc.org' <info@lpnc.org>; 'nconley@mcdowellnews.com' <nconley@mcdowellnews.com>; 'editor@mitchellnews.com' <editor@mitchellnews.com>; 'reporter1@mitchellnews.com' <reporter1@mitchellnews.com>; 'dibach@statesville.com' <dibach@statesville.com>; 'lwall@morganton.com' <lwall@morganton.com>; 'tom.mayer@mountaintimes.com' <tom.mayer@mountaintimes.com>; 'news@mountainx.com' <news@mountainx.com>; 'cmorrisroe@mountainx.com' <cmorrisroe@mountainx.com>; 'publisher@mountainx.com' <publisher@mountainx.com>; 'tjoyce@civitasmedia.com' <tjoyce@civitasmedia.com>; 'jlinville@civitasmedia.com' <jlinville@civitasmedia.com>; 'erika.edwards@nbcuni.com' <erika.edwards@nbcuni.com>; 'greg.kohler@nbcuni.com' <greg.kohler@nbcuni.com>; 'jen.croteau@nbcuni.com' <jen.croteau@nbcuni.com>; 'mike.mcfeeters@nbcuni.com' <mike.mcfeeters@nbcuni.com>; 'beta@ncbeaches.com' <beta@ncbeaches.com>; 'brian.balfoul@nccivitas.org' <brian.balfoul@nccivitas.org>; 'communications@ncgop.org' <communications@ncgop.org>; 'emily.weeks@ncgop.org' <emily.weeks@ncgop.org>; 'communications@ncgop.org' <communications@ncgop.org>; 'rose.hoban@gmail.com' <rose.hoban@gmail.com>; 'mark@flyingcar.cc' <mark@flyingcar.cc>; 'lhorsch@ncinsider.com' <lhorsch@ncinsider.com>; 'BFerrell@ncnn.com' <BFerrell@ncnn.com>; 'newsroom@ncnn.com' <newsroom@ncnn.com>; 'phil@ncpress.com' <phil@ncpress.com>; 'tomcamp@carolinabroadcasting.com' <tomcamp@carolinabroadcasting.com>; 'roberthoward@ncdemocraticparty.org' <roberthoward@ncdemocraticparty.org>; 'Eddie.Fitzgerald@newbernsj.com' <Eddie.Fitzgerald@newbernsj.com>; 'sjnewsroom@newbernsj.com' <sjnewsroom@newbernsj.com>; 'cal.bryant@r-cnews.com' <cal.bryant@r-cnews.com>; 'gene.motley@r-cnews.com' <gene.motley@r-cnews.com>; 'Holly.Taylor@r-cnews.com' <Holly.Taylor@r-cnews.com>; 'info@nsjonline.com' <info@nsjonline.com>; 'emily@northstatemedia.com' <emily@northstatemedia.com>; 'cory.lavalette@nsjonline.com' <cory.lavalette@nsjonline.com>; 'neel@obsentinel.com' <neel@obsentinel.com>; 'info@outerbanksvoice.com' <info@outerbanksvoice.com>; 'r.rao@pageantmedia.com' <r.rao@pageantmedia.com>; 'hbradford@pionline.com' <hbradford@pionline.com>; 'thepiloteditor@gmail.com' <thepiloteditor@gmail.com>; 'mkmurphy@thepilot.com' <mkmurphy@thepilot.com>; 'lauradouglass145@gmail.com' <lauradouglass145@gmail.com>; 'news@portcitydaily.com' <news@portcitydaily.com>; 'Michael.p@localvoicemedia.com' <Michael.p@localvoicemedia.com>; 'vcrowder@publicradioeast.org' <vcrowder@publicradioeast.org>; 'aromero@quepasamedia.com' <aromero@quepasamedia.com>; 'etupayachi@quepasamedia.com' <etupayachi@quepasamedia.com>; 'icruz@quepasamedia.com' <icruz@quepasamedia.com>; 'lbonner@newsobserver.com' <lbonner@newsobserver.com>; 'wdoran@newsobserver.com' <wdoran@newsobserver.com>; 'togburn@newsobserver.com' <togburn@newsobserver.com>; 'jdrescher@newsobserver.com' <jdrescher@newsobserver.com>; 'nbarnett@newsobserver.com' <nbarnett@newsobserver.com>; 'jschrader@newsobserver.com' <jschrader@newsobserver.com>; 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<Brenda.Williams@nctreasurer.com>; Christopher Morris <Christopher.Morris@nctreasurer.com>; Jeff Smith <Jeff.S.Smith@nctreasurer.com>; Cindy Aiken <Cindy.Aiken@nctreasurer.com>; Dee Jones <Dee.Jones@nctreasurer.com>; Dale Folwell <Dale@Nctreasurer.com>; Sam Hayes <Sam.Hayes@nctreasurer.com>; Edgar Starnes <Edgar.Starnes@nctreasurer.com>; Sharon Edmundson <Sharon.Edmundson@nctreasurer.com>; Powell Baggett <Powell.Baggett@nctreasurer.com>

**Subject:** Treasurer Folwell Comments on DOJ/Atrium Settlement



**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER

STATE  
DA  
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FOR IMMEDIATE RELEASE

November 26, 2018

Contact: Frank Lester

919-814-3811

**Treasurer Folwell Calls for US Department of Justice to Recover Hundreds of Millions Potentially owed to NC Taxpayers from Hospitals' Anti-Competitive Activities and to Enforce Transparency in Pricing**

*Calls for Pricing Transparency from all North Carolina Hospitals*

(Raleigh, N.C.) – State Treasurer Dale R. Folwell, CPA, today called for the United States Department of Justice to take action and for all North Carolina hospitals to be transparent in their pricing. The announcement was made in light of the recent settlement of a lawsuit filed by the United States Department of Justice and the North Carolina Department of Justice against Atrium Health, formerly known as Carolinas Healthcare System.

The civil antitrust lawsuit challenged provisions in Atrium's contracts with major health insurers including Blue Cross and Blue Shield of North Carolina (Blue Cross NC) that prohibited what otherwise would have been used to direct consumers towards high quality, cost-effective health care providers.

"For decades, the largest public hospital system in North Carolina has been engaging in this and other anti-competitive activities," said Treasurer Folwell. "In the spirit of this settlement, I'm calling on all North Carolina hospitals to be transparent and to publish their pricing so consumers can make informed decisions regarding health care. I'm also calling for the United States Department of Justice and the North Carolina Department of Justice, on behalf of the State Health Plan, to recover the potentially hundreds of millions overcharged to consumers by hospital management from this illegal activity."

Earlier this year, the State Health Plan (Plan) submitted a public records request to UNC Health Care for a copy of its contract and fee schedule with Blue Cross NC. Blue Cross NC is the third party administrator for the Plan and negotiates pricing for the Plan's 727,000 members.

In response, UNC Health Care provided more than 100 pages of redacted information with no visible prices. The state-owned hospital said that pricing information between Blue Cross NC and itself is confidential. Treasurer Folwell responded with a press release highlighting its absurdity.

"The taxpayers need to understand that the state treasurer cannot find out from the state hospital what the State Health Plan is paying for medical services for state workers," said Folwell. "It's beyond belief."

## Anna Yount

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**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 1:43 PM  
**To:** Frank Lester; Edgar Starnes  
**Subject:** FW: Treasurer Folwell Comments on DOJ/Atrium Settlement

Edgar, please make sure this goes out to legislators AFTER frank send RBP letter.

### Dale R. Folwell, CPA

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*Dale R. Folwell, CPA*  
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DALE R. FOLWELL, CPA

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**From:** Press

**Sent:** Monday, November 26, 2018 12:42 PM

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**Subject:** Treasurer Folwell Comments on DOJ/Atrium Settlement



**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER

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**Anna Yount**

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**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 1:44 PM  
**To:** Ron Joyce  
**Subject:** RE: UNC Health Care System's Secrecy

thanks

**Dale R. Folwell, CPA**

*NC State Treasurer*  
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**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Ron Joyce [mailto:[ronjoyce@joycefoods.com](mailto:ronjoyce@joycefoods.com)]  
**Sent:** Monday, November 26, 2018 11:44 AM  
**To:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>  
**Subject:** RE: UNC Health Care System's Secrecy

Anything else I can do at this point? Have you seen this article?:

<https://www.favobserver.com/opinion/20181124/brian-balfour-boomer-retirements-pose-fiscal-challenges>

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## Anna Yount

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**To:** 'alamancenews@mail.com' <alamancenews@mail.com>; 'grobertson@ap.org' <grobertson@ap.org>; 'aprleigh@ap.org' <aprleigh@ap.org>; 'mwaggoner@ap.org' <mwaggoner@ap.org>; 'sforeman@ap.org' <sforeman@ap.org>; 'tom.mayer@mountaintimes.com' <tom.mayer@mountaintimes.com>; 'colin.tate@mountaintimes.com' <colin.tate@mountaintimes.com>; 'ian.taylor@mountaintimes.com' <ian.taylor@mountaintimes.com>; 'luke.weir@mountaintimes.com' <luke.weir@mountaintimes.com>; 'racriscoe@courier-tribune.com' <racriscoe@courier-tribune.com>; 'ajordan@courier-tribune.com' <ajordan@courier-tribune.com>; 'jdwalker@courier-tribune.com' <jdwalker@courier-tribune.com>; 'jbiggs@courier-tribune.com' <jbiggs@courier-tribune.com>; 'MBarrett@CITIZEN-TIMES.com' <MBarrett@CITIZEN-TIMES.com>; 'cblake@citizen-times.com' <cblake@citizen-times.com>; 'bponder@citizentimes.com' <bponder@citizentimes.com>; 'jburgess@citizen-times.com' <jburgess@citizen-times.com>; 'dwdavis@citizen-times.com' <dwdavis@citizen-times.com>; 'jbowman@citizen-times.com' <jbowman@citizen-times.com>; 'editor@thetribunepapers.com' <editor@thetribunepapers.com>; 'editor@averyjournal.com' <editor@averyjournal.com>; 'news@averyjournal.com' <news@averyjournal.com>; 'paul@blackmountainnews.com' <paul@blackmountainnews.com>; 'news@blackmountainnews.com' <news@blackmountainnews.com>; 'anna.oakes@wataugademocrat.com' <anna.oakes@wataugademocrat.com>; 'mabernethy@thetimesnews.com' <mabernethy@thetimesnews.com>; 'bcresenzo@thetimesnews.com' <bcresenzo@thetimesnews.com>; 'rich.jackson@thetimesnews.com' <rich.jackson@thetimesnews.com>; 'dmildenberg@businessnc.com' <dmildenberg@businessnc.com>; 'chris.william@wellsfargoadvisors.com' <chris.william@wellsfargoadvisors.com>; 'dway@carolinajournal.com' <dway@carolinajournal.com>; 'rhenderson@carolinajournal.com' <rhenderson@carolinajournal.com>; 'cashmichaels@yahoo.com' <cashmichaels@yahoo.com>; 'jackie@thenewstimes.com' <jackie@thenewstimes.com>;

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'logan@sanfordherald.com' <logan@sanfordherald.com>; 'zhornier@sanfordherald.com' <zhornier@sanfordherald.com>; 'dturbyfill@shelbystar.com' <dturbyfill@shelbystar.com>; 'jessi@smokymountainnews.com' <jessi@smokymountainnews.com>; 'garret@smokymountainnews.com' <garret@smokymountainnews.com>; 'cory@smokymountainnews.com' <cory@smokymountainnews.com>; 'holly@smokymountainnews.com' <holly@smokymountainnews.com>; 'centralncnews@charter.com' <centralncnews@charter.com>; 'tim.boyum@charter.com' <tim.boyum@charter.com>; 'loretta.boniti@charter.com' <loretta.boniti@charter.com>; 'cltnews@charter.com' <cltnews@charter.com>; 'coastalncnews@charter.com' <coastalncnews@charter.com>; 'triadnews@charter.com' <triadnews@charter.com>; 'bj@stanlynewspress.com' <bj@stanlynewspress.com>; 'svlfreenews@gmail.com' <svlfreenews@gmail.com>; 'staylor@statesville.com'

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**Subject:** Treasurer Folwell Comments on DOJ/Atrium Settlement



**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER

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FOR IMMEDIATE RELEASE

November 26, 2018

Contact: Frank Lester

919-814-3811

**Treasurer Folwell Calls for US Department of Justice to Recover Hundreds of Millions Potentially owed to NC Taxpayers from Hospitals' Anti-Competitive Activities and to Enforce Transparency in Pricing**

*Calls for Pricing Transparency from all North Carolina Hospitals*

(Raleigh, N.C.) – State Treasurer Dale R. Folwell, CPA, today called for the United States Department of Justice to take action and for all North Carolina hospitals to be transparent in their pricing. The announcement was made in light of the recent settlement of a lawsuit filed by the United States Department of Justice and the North Carolina Department of Justice against Atrium Health, formerly known as Carolinas Healthcare System.

The civil antitrust lawsuit challenged provisions in Atrium's contracts with major health insurers including Blue Cross and Blue Shield of North Carolina (Blue Cross NC) that prohibited what otherwise would have been used to direct consumers towards high quality, cost-effective health care providers.

"For decades, the largest public hospital system in North Carolina has been engaging in this and other anti-competitive activities," said Treasurer Folwell. "In the spirit of this settlement, I'm calling on all North Carolina hospitals to be transparent and to publish their pricing so consumers can make informed decisions regarding health care. I'm also calling for the United States Department of Justice and the North Carolina Department of Justice, on behalf of the State Health Plan, to recover the potentially hundreds of millions overcharged to consumers by hospital management from this illegal activity."

Earlier this year, the State Health Plan (Plan) submitted a public records request to UNC Health Care for a copy of its contract and fee schedule with Blue Cross NC. Blue Cross NC is the third party administrator for the Plan and negotiates pricing for the Plan's 727,000 members.

In response, UNC Health Care provided more than 100 pages of redacted information with no visible prices. The state-owned hospital said that pricing information between Blue Cross NC and itself is confidential. Treasurer Folwell responded with a press release highlighting its absurdity.

"The taxpayers need to understand that the state treasurer cannot find out from the state hospital what the State Health Plan is paying for medical services for state workers," said Folwell. "It's beyond belief."

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 1:47 PM  
**To:** Dee Jones  
**Subject:** FW: Treasurer Folwell Comments on DOJ/Atrium Settlement

Please send to the BOARD. Thanks

### Dale R. Folwell, CPA

NC State Treasurer  
Office of the State Treasurer  
Office: (919) 814-3807

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NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Press

**Sent:** Monday, November 26, 2018 12:42 PM

**To:** 'alamancenews@mail.com' <alamancenews@mail.com>; 'grobertson@ap.org' <grobertson@ap.org>; 'aprleigh@ap.org' <aprleigh@ap.org>; 'mwaggoner@ap.org' <mwaggoner@ap.org>; 'sforeman@ap.org' <sforeman@ap.org>; 'tom.mayer@mountaintimes.com' <tom.mayer@mountaintimes.com>; 'colin.tate@mountaintimes.com' <colin.tate@mountaintimes.com>; 'ian.taylor@mountaintimes.com' <ian.taylor@mountaintimes.com>; 'luke.weir@mountaintimes.com' <luke.weir@mountaintimes.com>; 'racriscoe@courier-tribune.com' <racriscoe@courier-tribune.com>; 'ajordan@courier-tribune.com' <ajordan@courier-tribune.com>; 'jdwalker@courier-tribune.com' <jdwalker@courier-tribune.com>; 'jbiggs@courier-tribune.com' <jbiggs@courier-tribune.com>; 'MBarrett@CITIZEN-TIMES.com' <MBarrett@CITIZEN-TIMES.com>; 'cblake@citizen-times.com' <cblake@citizen-times.com>; 'bponder@citizentimes.com' <bponder@citizentimes.com>; 'jburgess@citizen-times.com' <jburgess@citizen-times.com>; 'dwdavis@citizen-times.com' <dwdavis@citizen-times.com>; 'jbowman@citizen-times.com' <jbowman@citizen-times.com>; 'editor@thetribunepapers.com' <editor@thetribunepapers.com>; 'editor@averyjournal.com' <editor@averyjournal.com>; 'news@averyjournal.com' <news@averyjournal.com>; 'paul@blackmountainnews.com' <paul@blackmountainnews.com>; 'news@blackmountainnews.com' <news@blackmountainnews.com>; 'anna.oakes@wataugademocrat.com' <anna.oakes@wataugademocrat.com>; 'mabernethy@thetimesnews.com' <mabernethy@thetimesnews.com>; 'bcresenzo@thetimesnews.com' <bcresenzo@thetimesnews.com>; 'rich.jackson@thetimesnews.com' <rich.jackson@thetimesnews.com>; 'dmildenberg@businessnc.com' <dmildenberg@businessnc.com>; 'chris.william@wellsfargoadvisors.com' <chris.william@wellsfargoadvisors.com>; 'dway@carolinajournal.com' <dway@carolinajournal.com>; 'rhenderson@carolinajournal.com' <rhenderson@carolinajournal.com>; 'cashmichaels@yahoo.com' <cashmichaels@yahoo.com>; 'jackie@thenewstimes.com' <jackie@thenewstimes.com>;

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**Subject:** Treasurer Folwell Comments on DOJ/Atrium Settlement



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FOR IMMEDIATE RELEASE

November 26, 2018

Contact: Frank Lester

919-814-3811

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**Anna Yount**

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**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 1:51 PM  
**To:** Frank Lester  
**Subject:** RE: Treasurer Folwell Comments on DOJ/Atrium Settlement

Please send presser to me again thanks

**Dale R. Folwell, CPA**

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**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Frank Lester  
**Sent:** Monday, November 26, 2018 1:45 PM  
**To:** Dale Folwell <Dale@Nctreasurer.com>; Edgar Starnes <Edgar.Starnes@nctreasurer.com>  
**Subject:** RE: Treasurer Folwell Comments on DOJ/Atrium Settlement

This has already gone out to legislators. Frank

**Frank G. Lester**

Deputy Treasurer  
Communications/Government Affairs  
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'ccope@charlotteobserver.com' <ccope@charlotteobserver.com>; 'ahelms@charlotteobserver.com' <ahelms@charlotteobserver.com>; 'schisenhall@charlotteobserver.com' <schisenhall@charlotteobserver.com>; 'ashley.mahoney@thecharlottepost.com' <ashley.mahoney@thecharlottepost.com>; 'herb.white@thecharlottepost.com' <herb.white@thecharlottepost.com>; 'dotwell@cherokeescout.com' <dotwell@cherokeescout.com>; 'bmedina@nccivitas.org' <bmedina@nccivitas.org>; 'ray.nothstine@ncCivitas.org' <ray.nothstine@ncCivitas.org>; 'jeff@compassnews3360.com' <jeff@compassnews3360.com>; 'ajordan@courier-tribune.com' <ajordan@courier-tribune.com>; 'jdwalker@courier-tribune.com' <jdwalker@courier-tribune.com>; 'rpitkin@ciclt.com' <rpitkin@ciclt.com>; 'jhawley@dailyadvance.com' <jhawley@dailyadvance.com>; 'jeure@dailyadvance.com' <jeure@dailyadvance.com>; 'jgordon@thedigitalcourier.com' <jgordon@thedigitalcourier.com>; 'jgordon@thedigitalcourier.com' <jgordon@thedigitalcourier.com>; 'editors@dailyhaymaker.com' <editors@dailyhaymaker.com>; 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Health Plan, to recover the potentially hundreds of millions overcharged to consumers by hospital management from this illegal activity."

Earlier this year, the State Health Plan (Plan) submitted a public records request to UNC Health Care for a copy of its contract and fee schedule with Blue Cross NC. Blue Cross NC is the third party administrator for the Plan and negotiates pricing for the Plan's 727,000 members.

In response, UNC Health Care provided more than 100 pages of redacted information with no visible prices. The state-owned hospital said that pricing information between Blue Cross NC and itself is confidential. Treasurer Folwell responded with a press release highlighting its absurdity.

"The taxpayers need to understand that the state treasurer cannot find out from the state hospital what the State Health Plan is paying for medical services for state workers," said Folwell. "It's beyond belief."

In order to begin reducing medical costs and to provide price transparency for its members, the Plan announced a new medical provider reimbursement strategy using referenced-based pricing based on a percentage over published government rates plus, on average, a 77 percent profit. The hospital association has vehemently opposed transparency in pricing and is intending to go to the North Carolina General Assembly to immediately stop the Plan's initiative to bring transparency and reduce costs. This opposition comes despite the state auditor's finding of seven years ago that the state is at risk for potentially overpaying medical claims.

If the hospital association is successful in stopping the Plan, then premiums, copays, and deductibles for the nearly 727,000 teachers, public safety workers, and other state and local employees are likely to increase. In addition, the projected \$300 million in savings to taxpayers and \$65 million in savings to members will never be realized. This could have a devastating effect on the long-term viability of the Plan.

"In North Carolina, we already spend \$3.4 billion a year in taxpayers' money for state employees and retiree health care. Additionally, we owe \$30 billion for long-term health care costs and we don't even know what we're supposed to pay for medical services," said Folwell. "If something isn't done now, then other core functions of government like education, public safety, and roads will be financially impacted."

Folwell also said that after his legal team reviews the settlement, he will be submitting comments on the proposed settlement to the United States Department of Justice.

"We're doing what's necessary at this point in our state's history because others didn't," said Folwell. "As chaotic as health care is, we have not lost our commitment on focusing all of our attention on the member and taxpayers like them. It's not enough to just point out problems, ultimately they have to be fixed."

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## Anna Yount

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**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 2:04 PM  
**To:** wpvm.103.7@gmail.com  
**Cc:** Frank Lester  
**Subject:** Davyne, Richard mentioned that we may be able to do a regular phone interview on things happening at the OST that impact AVL. Look forward, Dale

### Dale R. Folwell, CPA

*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)



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NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**Anna Yount**

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**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 2:47 PM  
**To:** Frank Lester  
**Subject:** FW: CALL IN to Radio show  
**Attachments:** CALL IN to Radio show

**Dale R. Folwell, CPA**

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**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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## Anna Yount

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**Subject:** CALL IN to Radio show  
**Location:** 704-333-2644 and 704-333-2643  
  
**Start:** Thu 8/30/2018 9:30 AM  
**End:** Thu 8/30/2018 9:30 AM  
  
**Recurrence:** (none)  
  
**Organizer:** Anna Yount

We are confirmed for Governor McCrory's show at 9:35 on Thursday morning. The studio lines are 704-333-2644 and 704-333-2643. The treasurer should call in at 9:30. Thanks!  
Stephanie

## Anna Yount

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**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 3:48 PM  
**To:** Anna Yount  
**Subject:** Need n and o sign in

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC  
27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)

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## Anna Yount

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**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 8:36 PM  
**To:** Dee Jones; Edgar Starnes; Frank Lester  
**Subject:** Feel free to take the state car

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

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**Anna Yount**

**From:** Dale Folwell  
**Sent:** Monday, November 26, 2018 9:47 PM  
**To:** nochsner@wbvtv.com  
**Subject:** Fwd: Treasurer Folwell Comments on DOJ/Atrium Settlement  
**Attachments:** image001.png; image002.png; image004.png; image005.jpg; image006.png; image007.png; image003.png

Repeat

**Dale R. Folwell, CPA**  
NC State Treasurer  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)

=====

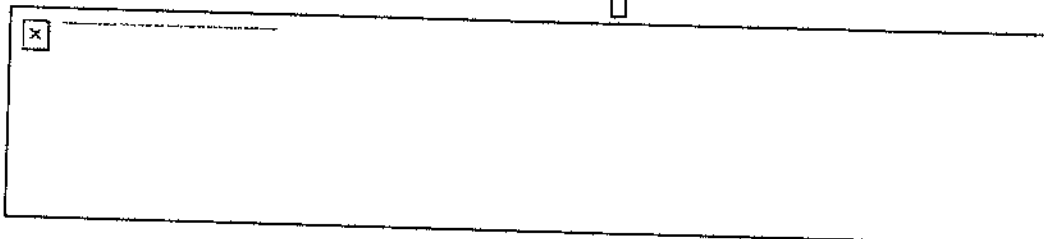
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Begin forwarded message:

**From:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>  
**Date:** November 26, 2018 at 1:04:13 PM EST  
**To:** "Nochsner@wbvtv.com" <[Nochsner@wbvtv.com](mailto:Nochsner@wbvtv.com)>  
**Subject:** FW: Treasurer Folwell Comments on DOJ/Atrium Settlement

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<ajordan@courier-tribune.com>; 'jdwalker@courier-tribune.com' <jdwalker@courier-tribune.com>;  
 'rpitkin@clclt.com' <rpitkin@clclt.com>; 'jhawley@dailyadvance.com' <jhawley@dailyadvance.com>;  
 'jeure@dailyadvance.com' <jeure@dailyadvance.com>; 'jgordon@thedigitalcourier.com'  
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 'rhedrick@hendersondispatch.com' <rhedrick@hendersondispatch.com>;  
 'jlafontaine@hickoryrecord.com' <jlafontaine@hickoryrecord.com>; 'ken@highcountrypress.com'  
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 'j.barhanovich@irei.com' <j.barhanovich@irei.com>; 'chris.segal@JDNews.com'  
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 'colin.tate@mountaintimes.com' <colin.tate@mountaintimes.com>;  
 'lee.sanderlin@mountaintimes.com' <lee.sanderlin@mountaintimes.com>; 'jhood@johnlocke.org'  
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 'wendy@kernersvillenews.com' <wendy@kernersvillenews.com>; 'linda@kernersvillenews.com'  
 <linda@kernersvillenews.com>; 'Dustin.George@Kinston.com' <Dustin.George@Kinston.com>;  
 'chris.segal@kinston.com' <chris.segal@kinston.com>; 'portiz@lanoticia.com' <portiz@lanoticia.com>;  
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 <dibach@statesville.com>; 'lwall@morganton.com' <lwall@morganton.com>;  
 'tom.mayer@mountaintimes.com' <tom.mayer@mountaintimes.com>; 'news@mountainx.com'  
 <news@mountainx.com>; 'cmorrisroe@mountainx.com' <cmorrisroe@mountainx.com>;

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 'valerie.bauerlein@wsj.com' <valerie.bauerlein@wsj.com>; 'vail.rumley@thewashingtondailynews.com'  
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 'deldridge@bpr.org' <deldridge@bpr.org>; 'mbush@bpr.org' <mbush@bpr.org>; 'news@wcti12.com'  
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 'bbriscoe@wfmy.com' <bbriscoe@wfmy.com>; 'news@wfmy.com' <news@wfmy.com>;  
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 tv.com' <joe.bruno@wsoc-tv.com>; 'henry@ibxmedia.com' <henry@ibxmedia.com>;  
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 'derek.rowles@abc.com' <derek.rowles@abc.com>; 'diane.l.wilson@abc.com'  
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 <ddewitt@wunc.org>; 'news@wunc.org' <news@wunc.org>; 'bwolfe@wunc.org' <bwolfe@wunc.org>;

North Carolina Department of Justice, on behalf of the State Health Plan, to recover the potentially hundreds of millions overcharged to consumers by hospital management from this illegal activity.”

Earlier this year, the State Health Plan (Plan) submitted a public records request to UNC Health Care for a copy of its contract and fee schedule with Blue Cross NC. Blue Cross NC is the third party administrator for the Plan and negotiates pricing for the Plan’s 727,000 members.

In response, UNC Health Care provided more than 100 pages of redacted information with no visible prices. The state-owned hospital said that pricing information between Blue Cross NC and itself is confidential. Treasurer Folwell responded with a press release highlighting its absurdity.

“The taxpayers need to understand that the state treasurer cannot find out from the state hospital what the State Health Plan is paying for medical services for state workers,” said Folwell. “It’s beyond belief.”

In order to begin reducing medical costs and to provide price transparency for its members, the Plan announced a new medical provider reimbursement strategy using referenced-based pricing based on a percentage over published government rates plus, on average, a 77 percent profit. The hospital association has vehemently opposed transparency in pricing and is intending to go to the North Carolina General Assembly to immediately stop the Plan’s initiative to bring transparency and reduce costs. This opposition comes despite the state auditor’s finding of seven years ago that the state is at risk for potentially overpaying medical claims.

If the hospital association is successful in stopping the Plan, then premiums, copays, and deductibles for the nearly 727,000 teachers, public safety workers, and other state and local employees are likely to increase. In addition, the projected \$300 million in savings to taxpayers and \$65 million in savings to members will never be realized. This could have a devastating effect on the long-term viability of the Plan.

“In North Carolina, we already spend \$3.4 billion a year in taxpayers’ money for state employees and retiree health care. Additionally, we owe \$30 billion for long-term health care costs and we don’t even know what we’re supposed to pay for medical services,” said Folwell. “If something isn’t done now, then other core functions of government like education, public safety, and roads will be financially impacted.”

Folwell also said that after his legal team reviews the settlement, he will be submitting comments on the proposed settlement to the United States Department of Justice.

“We’re doing what’s necessary at this point in our state’s history because others didn’t,” said Folwell. “As chaotic as health care is, we have not lost our commitment on focusing all of our attention on the member and taxpayers like them. It’s not enough to just point out problems, ultimately they have to be fixed.”

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NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA



NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER

STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA  
*Dale R. Folwell, CPA*

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## Anna Yount

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**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 5:11 AM  
**To:** wpvm.103.7 fm; Frank Lester  
**Cc:** Mark Lieberman  
**Subject:** Re: Davyne, Richard mentioned that we may be able to do a regular phone interview on things happening at the OST that impact AVL. Look forward, Dale  
**Attachments:** image001.png; image002.png; image003.png; image004.jpg; image005.png; image006.png

Great, Lots going on .. we can also add up the economic impact that the our office has on your listeners. Re: millions that come to retirees every month from the pension plan...  
Look forward

**Dale R. Folwell, CPA**  
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On Nov 27, 2018, at 3:01 AM, wpvm.103.7 fm <[wpvm.103.7@gmail.com](mailto:wpvm.103.7@gmail.com)> wrote:

Howdy Mr. Folwell,  
I am including Mark Lieberman in this return email. He will be contacting you to do a phone in interview. Thanks for reaching out to WPVM in Asheville.  
Regards,  
Davyne Dial

Davyne Dial  
President, Friends of WPVM  
Open 24 - 7

—











NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 5:13 AM  
**To:** Allen.McNeill@ncleg.net; Sam Watts  
**Subject:** Just saw your email,, we will respond. Thanks

**Dale R. Folwell, CPA**  
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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 5:31 AM  
**To:** Anna Yount  
**Subject:** Robert half

**Dale R. Folwell, CPA**  
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**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 9:25 AM  
**To:** Lorraine Munk; Dee Jones  
**Cc:** Frank Lester  
**Subject:** Re: Press Release - Pricing Transparency from NC Hospitals

Also send the video and letter that was sent to legislators

**Dale R. Folwell, CPA**  
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On Nov 27, 2018, at 8:55 AM, Lorraine Munk <[Lorraine.Munk@nctreasurer.com](mailto:Lorraine.Munk@nctreasurer.com)> wrote:

We wanted to share the following press release with you.

<image001.png>

FOR IMMEDIATE RELEASE  
November 26, 2018  
Contact: Frank Lester  
919-814-3811

**Treasurer Folwell Calls for US Department of Justice to Recover Hundreds of Millions Potentially owed to NC Taxpayers from Hospitals' Anti-Competitive Activities and to Enforce Transparency in Pricing**  
*Calls for Pricing Transparency from all North Carolina Hospitals*

(Raleigh, N.C.) – State Treasurer Dale R. Folwell, CPA, today called for the United States Department of Justice to take action and for all North Carolina hospitals to be transparent in their pricing. The announcement was made in light of the recent settlement of a lawsuit filed by the United States

**Lorraine Munk**

*Executive Assistant*

State Health Plan

Office: (919) 814-4409

3200 Atlantic Avenue, Raleigh, NC 27604

[www.SHPNC.org](http://www.SHPNC.org)

<image002.jpg>

<image003.png>

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**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 1:33 PM  
**To:** darren.jackson@ncleg.net  
**Subject:** Rep. Jackson, I am offering to meet with you or your caucus to discuss reference based pricing and the difference it will make in state employee live\$. Dale

**Dale R. Folwell, CPA**

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---

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*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 2:32 PM  
**To:** Craver, Richard N.  
**Cc:** Frank Lester  
**Subject:** RE: Am working on the JDIP bill story in Senate Finance

No worries. I was reaching out on the felony forfeiture story that you spoke to Frank about

### **Dale R. Folwell, CPA**

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*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Craver, Richard N. [mailto:[rcraver@wsjournal.com](mailto:rcraver@wsjournal.com)]  
**Sent:** Tuesday, November 27, 2018 2:29 PM  
**To:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>; Frank Lester <[Frank.Lester@nctreasurer.com](mailto:Frank.Lester@nctreasurer.com)>  
**Subject:** Am working on the JDIP bill story in Senate Finance

Our editors chose to pass on the Atrium-SHP connection you raised in yesterday's press release. You can raise the issue with Andy Morrissey, our editor, if you'd like

Richard Craver  
Business and health-care reporter  
Winston-Salem Journal  
(336) 727-7376  
(800) 642-0925, ext. 7376  
[@rcraverWSJ](https://twitter.com/rcraverWSJ)

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 2:57 PM  
**To:** Edgar Starnes  
**Subject:** RE: Rep. Larry Potts.

Did the legislators get my email and video?

### **Dale R. Folwell, CPA**

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DALE R. FOLWELL, CPA

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**From:** Edgar Starnes  
**Sent:** Tuesday, November 27, 2018 2:54 PM  
**To:** Dale Folwell <Dale@Nctreasurer.com>  
**Cc:** Chris Farr <Chris.Farr@nctreasurer.com>; Frank Lester <Frank.Lester@nctreasurer.com>  
**Subject:** Rep. Larry Potts.

Treasurer,

Rep. Potts would like for you to call him before the 5:00 caucus. His cell is 336-239-2280. He wants to discuss Rep. Dobson's bill with you

Edgar V. Starnes  
Senior Policy Advisor and Legislative Liaison  
Office of the State Treasurer  
Phone: (919) 814-3812

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 3:11 PM  
**To:** larry.potts@ncleg.net  
**Subject:** FW: Link to video

**Dale R. Folwell, CPA**

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**From:** Dale Folwell  
**Sent:** Wednesday, November 21, 2018 5:10 PM  
**To:** lobbyjunk@gmail.com  
**Subject:** Fwd: Link to video

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 3:12 PM  
**To:** Edgar Starnes  
**Subject:** RE: Rep. Larry Potts.

I forwarded video Please deliver letter

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**From:** Edgar Starnes  
**Sent:** Tuesday, November 27, 2018 3:01 PM  
**To:** Dale Folwell <Dale@Nctreasurer.com>  
**Subject:** Re: Rep. Larry Potts.

I'll ask.

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**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 3:33 PM  
**To:** dalefolwell@gmail.com  
**Subject:** FW: Time to improve hog waste disposal. I agree

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**From:** Fred Stanback [mailto:stanbackf@aol.com]  
**Sent:** Tuesday, November 27, 2018 3:06 PM  
**To:** info@roycooper.com  
**Cc:** mjackson@nexusstrategies.com; keneudy@gmail.com; jeremy.tarr@nc.gov; Tim.Moore@ncleg.net; Phil.Berger@ncleg.net; Dale Folwell <Dale@Nctreasurer.com>; Carl.Ford@ncleg.net; mog@zsr.org; jimbhuntjr@gmail.com; chuckmcgrady@bellsouth.net; TOM.MCINNIS@ncleg.net; jennifer.mundt@ncdenr.gov; rforr1946@gmail.com; michael.regan08@gmail.com; toddi.steelman@duke.edu; joshhstein@gmail.com; John.Szoka@ncleg.net; Harry.Warren@ncleg.net  
**Subject:** Time to improve hog waste disposal. I agree

# OPINION, Kemp Burdette: A chance to

2

Honda dealership pulls Market Street rezoning request

Nov 25 at 11:39 AM

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3

Wilmington shooting leaves juvenile injured

Nov 25 at 6:37 PM

---

4

8 arrested in recent Wilmington gun-related incidents

Nov 26 at 6:30 PM

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5

Does downtown Wilmington have a vacancy problem?

Nov 27 at 11:12 AM

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6

Missing Wilmington man found safe after nearly 3 weeks

Nov 25 at 1:52 PM

---

7

Brunswick County man pleads to child abuse charge

Nov 26 at 12:20 PM

---

8

Wilmington mother, son charged in gun incident

Nov 26 at 3:15 PM

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9

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## OPINION, Kemp Burdette: A chance to improve hog operations in N.C.

Nov 25 at 5:00 PM

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16

## New Hanover football coach Earl Smith retires

Nov 26 at 7:05 PM

1

## Editor of Southport's State Port Pilot dies

Nov 26 at 12:37 PM

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2

## Honda dealership pulls Market Street rezoning request

Nov 25 at 11:39 AM

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3

## Wilmington shooting leaves juvenile injured

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## 8 arrested in recent Wilmington gun-related incidents

Nov 26 at 6:30 PM

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## Does downtown Wilmington have a vacancy problem?

Nov 27 at 11:12 AM

---

6

## Missing Wilmington man found safe after nearly 3 weeks

Nov 25 at 1:52 PM

---



## Cape Fear chill: Overnight freeze warnings likely this week

Nov 26 at 11:50 AM

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14

## Defense wants murder charges dropped against Brunswick County driver

Nov 26 at 4:56 PM

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15

## OPINION, Kemp Burdette: A chance to improve hog operations in N.C.

Nov 25 at 5:00 PM

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16

## New Hanover football coach Earl Smith retires

Nov 26 at 7:05 PM

- 1
- 2
- 3
- 4

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HIDE CAPTION

A hog farm near Trenton is inundated with floodwaters from Hurricane Florence. [ASSOCIATED PRESS]

**By Kemp Burdette | For Star News Media**

Posted Nov 25, 2018 at 5:00 PM

Hurricane Florence left North Carolina awash in hog waste. But the waste generated by industrial hog operations is also a problem under sunny skies. This year we have a chance to improve how that waste is managed.

North Carolina's nearly 10 million hogs produce 9.5 billion gallons of waste each year. The Cape Fear River is ground zero for hog factory farms in N.C. -- there are more hogs raised here than any other place on earth. In Duplin County alone, 2.2 million hogs produce twice as much untreated waste as the sewage from the entire New York City metro area.

Most of those hogs are raised in factory farms, where hog feces and urine are kept in unlined cesspools, often the size of football fields. It's a cheap way to store waste for producers, but it costs North Carolina an uncounted fortune: toxic emissions from its industrial hog operations foul our air, contaminants

Mandatory groundwater monitoring when there's evidence pathogens or antibiotics from industrial animal operations have seeped into groundwater.

Required use by swine operators of a formula, which was created at great taxpayer expense, to evaluate the risk of phosphorus pollution when animal waste is applied to cropland.

Monthly electronic submission of records made under the permit, including when waste is sprayed on cropland, what crops it's sprayed on, monitoring of sprayed soils, and what happens to sludge, the solid remnants of waste that accumulate in cesspools.

Monthly submission of these reports is important because, under the current system, while the records are required, most are kept at the swine operations and never filed with the state, so they're not considered public records. As a result, the public has no access to information on the levels of pollutants in hog waste cesspools, or basic information like when, where, and how much waste is being sprayed in their communities.

We're in favor of more transparency because you can't solve a problem you ignore. We're in favor of making Smithfield and other pork giants do better

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 3:45 PM  
**To:** Steven B. Long  
**Cc:** Anna Yount  
**Subject:** RE: NCMGMA - Invitation for Mr. Folwell

Anna POC, thanks

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**From:** Steven B. Long [mailto:SBLong@wardandsmith.com]  
**Sent:** Tuesday, November 27, 2018 2:06 PM  
**To:** Dale Folwell <Dale@Nctreasurer.com>  
**Subject:** FW: NCMGMA - Invitation for Mr. Folwell

Dale – Cameron Cox is a friend of mine and support of yours. I hope you will be able to speak to this group as I think it includes many thought leaders and would be beneficial for you to attend. It was good to see you at the Art Museum recently. All the best, Steve

**From:** Cameron Cox III <Cameron.Cox@msochealth.com>  
**Sent:** Monday, October 29, 2018 11:17 AM  
**To:** Steven B. Long <SBLong@wardandsmith.com>  
**Subject:** FW: NCMGMA - Invitation for Mr. Folwell

**From:** Melissa Klingberg <melissa@associationoffices.com>  
**Sent:** Monday, October 29, 2018 11:12 AM  
**To:** [anna.yount@nctreasurer.com](mailto:anna.yount@nctreasurer.com)  
**Cc:** Cameron Cox III <cameron.cox@msochealth.com>  
**Subject:** NCMGMA - Invitation for Mr. Folwell

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 3:58 PM  
**To:** [ajohnson@newsobserver.com](mailto:ajohnson@newsobserver.com)  
**Cc:** Frank Lester  
**Subject:** Good article on the former Wake ROD. I know Frank is assisting with your questions.  
Thanks

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 4:00 PM  
**To:** Anna Yount  
**Subject:** FW: NCICU Holiday Reception 2018 RSVP Reminder

Poc x

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**From:** N.C.Independent Colleges & Universities [mailto:paperlesspost@accounts.paperlesspost.com]  
**Sent:** Tuesday, November 27, 2018 10:03 AM  
**To:** Dale Folwell <Dale@Nctreasurer.com>  
**Subject:** NCICU Holiday Reception 2018 RSVP Reminder

We hope that you will be able to attend our annual Holiday Reception on Wednesday, December 5th from 5:30 PM to 7:00 PM at the NCICU office, 530 N Blount St, Raleigh, NC. We look forward to hearing from you by November 30th.

WILL ATTEND

WILL NOT ATTEND

**Anna Yount**

**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 8:41 PM  
**To:** Rep. Darren Jackson  
**Subject:** Re: Rep. Jackson, I am offering to meet with you or your caucus to discuss reference based pricing and the difference it will make in state employee live\$. Dale

That is a fair response which is what I have come to expect. Thanks.

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On Nov 27, 2018, at 8:19 PM, Rep. Darren Jackson <[Darren.Jackson@ncleg.net](mailto:Darren.Jackson@ncleg.net)> wrote:

Thank you sir. I'm hearing of a bill and am going to open up an opportunity to SEANC and the Hospital Association to make presentations. I will also make you offer to the caucus and let you know if we get any takers.

As always, I appreciate your willingness to speak to us.

Darren Jackson

<image007.jpg>

North Carolina General Assembly  
House District 39  
Legislative Office Building, Room 506  
919-733-5974 Phone  
[darren.jackson@ncleg.net](mailto:darren.jackson@ncleg.net)  
Click [here](#) for legislative information

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 9:49 PM  
**To:** Laura Rowe; Chris Farr; darrell.malcomb@ncleg.net  
**Subject:** Pls proceed with Debt Afford Study reappointments .They have both agreed! Thanks

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 5:17 AM  
**To:** darrell.malcolm@ncleg.net  
**Subject:** Fwd: Undeliverable: Pls proceed with Debt Afford Study reappointments .They have both agreed! Thanks  
**Attachments:** mime-attachment; ATT00001.htm

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Begin forwarded message:

**From:** Mail Delivery System <[MAILER-DAEMON@nctreasurer.com](mailto:MAILER-DAEMON@nctreasurer.com)>  
**Date:** November 27, 2018 at 9:49:26 PM EST  
**To:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>  
**Subject:** Undeliverable: Pls proceed with Debt Afford Study reappointments .They have both agreed! Thanks

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[darrell.malcomb@ncleg.net](mailto:darrell.malcomb@ncleg.net)

A problem occurred during the delivery of this message to this e-mail address. Try sending this message again. If the problem continues, please contact your helpdesk.

The following organization rejected your message: [gabo9.ncga.state.nc.us](http://gabo9.ncga.state.nc.us).

Reporting-MTA: dns; ZixGateway01.nctreasurer.com

Final-recipient: RFC822; darrell.malcomb@ncleg.net

Action: failed

Status: 5.0.0

Remote-MTA: dns; gabo9.ncga.state.nc.us

X-Supplementary-Info: <gabo9.ncga.state.nc.us #5.0.0 smtp; 550 No such user  
(darrell.malcomb@ncleg.net)>



**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 7:49 AM  
**To:** Mary Buonfiglio; Steve Toole  
**Cc:** Anna Yount  
**Subject:** Martina was unable to do the photo-op on Tuesday. We will do at next the ABLE meeting. Thanks

**Dale R. Folwell, CPA**

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**Anna Yount**

**From:**

**Sent:**

**To:**

**Subject:**

Dale Folwell

Wednesday, November 28, 2018 8:15 AM

Patrick Kinlaw

can you come up

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 9:56 AM  
**To:** jmorrell@charlotteobserver.com  
**Subject:** FW: Press Release - Pricing Transparency from NC Hospitals

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**From:** Dale Folwell  
**Sent:** Tuesday, November 27, 2018 9:25 AM  
**To:** Lorraine Munk <Lorraine.Munk@nctreasurer.com>; Dee Jones <Dee.Jones@nctreasurer.com>

Also send the video and letter that was sent to legislators

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association has vehemently opposed transparency in pricing and is intending to go to the North Carolina General Assembly to immediately stop the Plan's initiative to bring transparency and reduce costs. This opposition comes despite the state auditor's finding of seven years ago that the state is at risk for potentially overpaying medical claims.

If the hospital association is successful in stopping the Plan, then premiums, copays, and deductibles for the nearly 727,000 teachers, public safety workers, and other state and local employees are likely to increase. In addition, the projected \$300 million in savings to taxpayers and \$65 million in savings to members will never be realized. This could have a devastating effect on the long-term viability of the Plan.

"In North Carolina, we already spend \$3.4 billion a year in taxpayers' money for state employees and retiree health care. Additionally, we owe \$30 billion for long-term health care costs and we don't even know what we're supposed to pay for medical services," said Folwell. "If something isn't done now, then other core functions of government like education, public safety, and roads will be financially impacted."

Folwell also said that after his legal team reviews the settlement, he will be submitting comments on the proposed settlement to the United States Department of Justice.

"We're doing what's necessary at this point in our state's history because others didn't," said Folwell. "As chaotic as health care is, we have not lost our commitment on focusing all of our attention on the member and taxpayers like them. It's not enough to just point out problems, ultimately they have to be fixed."

## **Lorraine Munk**

*Executive Assistant*  
State Health Plan  
Office: (919) 814-4409

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.SHPNC.org](http://www.SHPNC.org)  
<image002.jpg>

<image003.png>

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**Anna Yount**

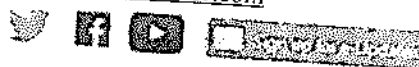
**From:**  
**Sent:**  
**To:**  
**Subject:**

Dale Folwell  
Wednesday, November 28, 2018 10:00 AM  
jmorrell@charlotteobserver.com  
FW: Video

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DALE R. FOLWELL, CPA

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**From:** Dale R. Folwell, CPA  
**Dale** *NC State Treasurer*  
**Folwell** *Office of the State Treasurer*  
**Sent:** *Office: (919) 814-3807*  
Friday,  
November  
09, 2018  
5:10 PM  
**To:**

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)

=====

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Begin forwarded message:



## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 10:32 AM  
**To:** [bridget.chisholm@bwcconsulting.com](mailto:bridget.chisholm@bwcconsulting.com)  
**Subject:** Re: Follow-up Meeting Request

Anna,  
Pls POC with Commissioner Chisholm,  
Thanks

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC  
27604  
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On Nov 28, 2018, at 9:30 AM, "[bridget.chisholm@bwcconsulting.com](mailto:bridget.chisholm@bwcconsulting.com)" <[bridget.chisholm@bwcconsulting.com](mailto:bridget.chisholm@bwcconsulting.com)> wrote:

Treasurer Folwell,  
Good morning, I hope you had a Blessed Thanksgiving. I am following-up from the Banking meeting earlier this month to put time on your calendar to meet before the 1/23/19 meeting. Would Tuesday the day before work or a morning coffee before or after on 23rd?  
Thank you in advance for your time.

Warmly,

Bridget Chisholm  
**BWC Consulting**  
Email: [bridget.chisholm@bwcconsulting.com](mailto:bridget.chisholm@bwcconsulting.com)  
Website: <http://www.bwcconsulting.com>

**North Carolina**  
PO Box 5183  
Greensboro, NC 27435  
Phone: 336.691.5786  
Mobile: 901.230.3980  
<906553FD-70DB-49C3-8520-B51A72E4E58A[453].png>

**Anna Yount**

**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 10:39 AM  
**To:** [bridget.chisholm@bwcconsulting.com](mailto:bridget.chisholm@bwcconsulting.com)  
**Cc:** Anna Yount  
**Subject:** Re: Follow-up Meeting Request

Or we could meet on the front end of my WFMY regular visit in GSO!

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
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27604  
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On Nov 28, 2018, at 9:30 AM, "[bridget.chisholm@bwcconsulting.com](mailto:bridget.chisholm@bwcconsulting.com)" <[bridget.chisholm@bwcconsulting.com](mailto:bridget.chisholm@bwcconsulting.com)> wrote:

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Bridget Chisholm  
**BWC Consulting**  
Email: [bridget.chisholm@bwcconsulting.com](mailto:bridget.chisholm@bwcconsulting.com)  
Website: <http://www.bwcconsulting.com>

**North Carolina**  
PO Box 5183  
Greensboro, NC 27435  
Phone: 336.691.5786  
Mobile: 901.230.3980  
<906553FD-70DB-49C3-8520-B51A72E4E58A[453].png>

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 10:40 AM  
**To:** Anna Yount  
**Subject:** Fwd: Follow-up Meeting Request  
**Attachments:** 906553FD-70DB-49C3-8520-B51A72E4E58A[453].png

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

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Begin forwarded message:

**From:** Dale Folwell <[Dale@Nctreasurer.com](mailto:Dale@Nctreasurer.com)>  
**Date:** November 28, 2018 at 10:31:49 AM EST  
**To:** "[bridget.chisholm@bwccconsulting.com](mailto:bridget.chisholm@bwccconsulting.com)" <[bridget.chisholm@bwccconsulting.com](mailto:bridget.chisholm@bwccconsulting.com)>  
**Subject:** Re: Follow-up Meeting Request

Anna,  
Pls POC with Commissioner Chisholm,  
Thanks

**Dale R. Folwell, CPA**  
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**Anna Yount**

**From:**

**Sent:**

**To:**

**Subject:**

Dale Folwell

Wednesday, November 28, 2018 12:53 PM

Rhonda Smith; Casey High  
sorry I can not do ValueAct today

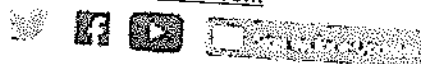
**Dale R. Folwell, CPA**

*NC State Treasurer*

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**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 1:37 PM  
**To:** pat.mcelraft@ncleg.net  
**Subject:** FW: Press Release - Pricing Transparency from NC Hospitals

**Dale R. Folwell, CPA**

*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
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**NORTH CAROLINA**  
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*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 9:56 AM  
**To:** 'jmorrell@charlotteobserver.com' <jmorrell@charlotteobserver.com>  
**Subject:** FW: Press Release - Pricing Transparency from NC Hospitals

**Dale R. Folwell, CPA**

*NC State Treasurer*  
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**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

(Raleigh, N.C.) – State Treasurer Dale R. Folwell, CPA, today called for the United States Department of Justice to take action and for all North Carolina hospitals to be transparent in their pricing. The announcement was made in light of the recent settlement of a lawsuit filed by the United States Department of Justice and the North Carolina Department of Justice against Atrium Health, formerly known as Carolinas Healthcare System.

The civil antitrust lawsuit challenged provisions in Atrium's contracts with major health insurers including Blue Cross and Blue Shield of North Carolina (Blue Cross NC) that prohibited what otherwise would have been used to direct consumers towards high quality, cost-effective health care providers.

"For decades, the largest public hospital system in North Carolina has been engaging in this and other anti-competitive activities," said Treasurer Folwell. "In the spirit of this settlement, I'm calling on all North Carolina hospitals to be transparent and to publish their pricing so consumers can make informed decisions regarding health care. I'm also calling for the United States Department of Justice and the North Carolina Department of Justice, on behalf of the State Health Plan, to recover the potentially hundreds of millions overcharged to consumers by hospital management from this illegal activity."

Earlier this year, the State Health Plan (Plan) submitted a public records request to UNC Health Care for a copy of its contract and fee schedule with Blue Cross NC. Blue Cross NC is the third party administrator for the Plan and negotiates pricing for the Plan's 727,000 members.

In response, UNC Health Care provided more than 100 pages of redacted information with no visible prices. The state-owned hospital said that pricing information between Blue Cross NC and itself is confidential. Treasurer Folwell responded with a press release highlighting its absurdity.

"The taxpayers need to understand that the state treasurer cannot find out from the state hospital what the State Health Plan is paying for medical services for state workers," said Folwell. "It's beyond belief."

In order to begin reducing medical costs and to provide price transparency for its members, the Plan announced a new medical provider reimbursement strategy using referenced-based pricing based on a percentage over published government rates plus, on average, a 77 percent profit. The hospital association has vehemently opposed transparency in pricing and is intending to go to the North Carolina General Assembly to immediately stop the Plan's initiative to bring transparency and reduce costs. This opposition comes despite the state auditor's finding of seven years ago that the state is at risk for potentially overpaying medical claims.

If the hospital association is successful in stopping the Plan, then premiums, copays, and deductibles for the nearly 727,000 teachers, public safety workers, and other state and local employees are likely to increase. In addition, the projected \$300 million in savings to taxpayers and \$65 million in savings to members will never be realized. This could have a devastating effect on the long-term viability of the Plan.

"In North Carolina, we already spend \$3.4 billion a year in taxpayers' money for state employees and retiree health care. Additionally, we owe \$30 billion for long-term health care costs and we don't even know what we're supposed to pay for medical services," said Folwell. "If something isn't done now, then other core functions of government like education, public safety, and roads will be financially impacted."

Folwell also said that after his legal team reviews the settlement, he will be submitting comments on the proposed settlement to the United States Department of Justice.

"We're doing what's necessary at this point in our state's history because others didn't," said Folwell. "As chaotic as health care is, we have not lost our commitment on focusing all of our attention

## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 1:38 PM  
**To:** pat.mcelraft@ncleg.net  
**Subject:** FW: Video

### Dale R. Folwell, CPA

*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
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*Dale R. Folwell, CPA*  
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DALE R. FOLWELL, CPA

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**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 10:00 AM  
**To:** 'jmmorrill@charlotteobserver.com' <jmmorrill@charlotteobserver.com>  
**Subject:** FW: Video

### Dale R. Folwell, CPA

*NC State Treasurer*  
Office of the State Treasurer  
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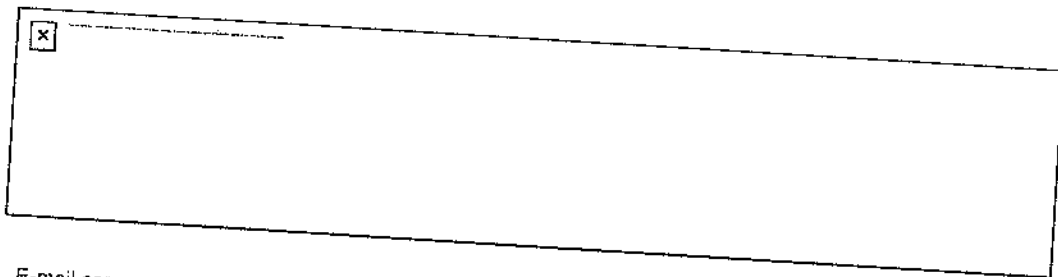
---

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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 1:40 PM  
**To:** pat.mcelraft@ncleg.net  
**Subject:** FW: Video

### **Dale R. Folwell, CPA**

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**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 10:00 AM  
**To:** **Subject:** FW: Video

### **Dale R. Folwell, CPA**

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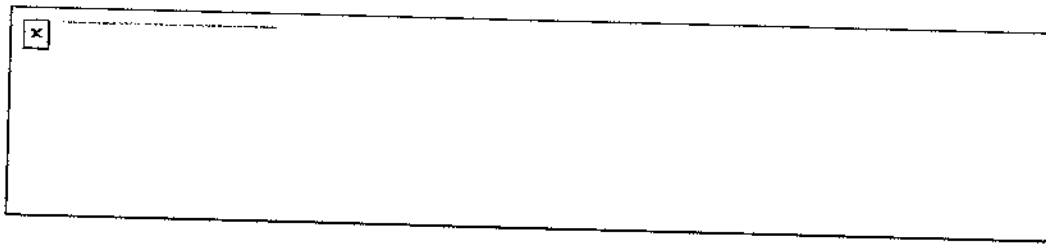


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DALE R. FOLWELL, CPA



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## Anna Yount

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 2:00 PM  
**To:** Edgar Starnes  
**Cc:** Chris Farr  
**Subject:** RE: Meeting

You need to make sure they saw it and at least viewed the video

### **Dale R. Folwell, CPA**

*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)



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DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
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DALE R. FOLWELL, CPA

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**From:** Edgar Starnes  
**Sent:** Wednesday, November 28, 2018 1:55 PM  
**To:** Dale Folwell <Dale@Nctreasurer.com>  
**Cc:** Chris Farr <Chris.Farr@nctreasurer.com>  
**Subject:** Re: Meeting

I had Jamie Boles pull it up on his email and every member was on the distribution list. Truthfully it is shocking how many members don't read their email. I'm confident they got it but I can't promise they didn't delete it without reading.

Edgar V. Starnes  
Senior Policy Advisor and Legislative Liaison  
Office of the State Treasurer  
Phone: (919) 814-3812

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 1:45 PM  
**To:** Edgar Starnes  
**Cc:** Chris Farr  
**Subject:** RE: Meeting

Edgar,

Please make sure all members have the video and press release....I HAVE NOT SPOKEN TO one MEMBER WHO HAS SEEN IT...

**Dale R. Folwell, CPA**

*NC State Treasurer*  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
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**NORTH CAROLINA**  
DEPARTMENT OF STATE TREASURER



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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**From:** Edgar Starnes  
**Sent:** Wednesday, November 28, 2018 1:15 PM  
**To:** Dale Folwell <Dale@Nctreasurer.com>; Chris Farr <Chris.Farr@nctreasurer.com>; Frank Lester <Frank.Lester@nctreasurer.com>  
**Subject:** Meeting

The Speaker's Office wants to keep the meeting today at 4:00 so they can report back to the caucus in the morning.

Edgar V. Starnes  
Senior Policy Advisor and Legislative Liaison  
Office of the State Treasurer  
Phone: (919) 814-3812

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)



**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Wednesday, November 28, 2018 6:41 PM  
**To:** Darrell Malcolm (President Pro Tem's Office)  
**Subject:** Re: Pro Tem appointments to Debt Affordability Advisory Committee

Thanks

Dale R. Folwell, CPA  
NC State Treasurer  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC 27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)

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On Nov 28, 2018, at 2:00 PM, Darrell Malcolm (President Pro Tem's Office) <[Darrell.Malcolm@ncleg.net](mailto:Darrell.Malcolm@ncleg.net)> wrote:

<image001.png>

DARRELL E. MALCOLM

SPECIAL ASSISTANT TO THE PRESIDENT PRO TEMPORE

DIRECTOR OF BOARDS AND COMMISSIONS

2000 LEGISLATIVE BUILDING

RALEIGH, NC 27601

919-301-1728

[Twitter](#) | [Facebook](#) | [YouTube](#)

<Aikmus.pdf>

<Briner.pdf>

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Thursday, November 29, 2018 8:18 AM  
**To:** Patrick Kinlaw  
**Subject:** LGERS. Employers contribution rate for next year? Projections for next 2 years??

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
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**Anna Yount**

**From:** Dale Folwell  
**Sent:** Thursday, November 29, 2018 10:24 AM  
**To:** burleymitchell40@gmail.com  
**Cc:** Anna Yount; Brenda Williams  
**Subject:** Please check an aged UPD claim filed months ago by Judge Mitchell. Thanks

**Dale R. Folwell, CPA**  
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**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Thursday, November 29, 2018 11:33 AM  
**To:** Nicole James  
**Cc:** Chris Farr  
**Subject:** Re: Retirement send-off

I am in court sorry

**Dale R. Folwell, CPA**  
*NC State Treasurer*  
Office of the State Treasurer  
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On Nov 29, 2018, at 10:52 AM, Nicole James <[Nicole.James@nctreasurer.com](mailto:Nicole.James@nctreasurer.com)> wrote:

<ATT71737>

<meeting.ics>

**Anna Yount**

---

**From:** Dale Folwell  
**Sent:** Thursday, November 29, 2018 1:38 PM  
**To:** jeff.butler@mail.house.gov  
**Subject:** NC Treasurer Dale Folwell/HIT  
**Attachments:** McHenryHIT.18ltr.pdf

Jeff –

Would you please forward the attached letter to Rep. McHenry? Very important that he sees it soon. Please acknowledge receipt. Thanks.

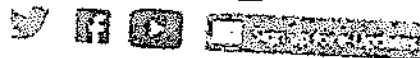
Best,

Dale

**Dale R. Folwell, CPA**

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STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

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NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER

STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

*Dale R. Folwell, CPA*

STATE TREASURER OF NORTH CAROLINA

DALE R. FOLWELL, CPA

November 29, 2018

The Honorable Patrick McHenry  
United States House of Representatives  
Washington, D.C.

Dear Rep. McHenry:

The North Carolina Department of State Treasurer oversees the delivery of health care services, through the State Health Plan (Plan), to more than 727,000 state and local employees and retirees. We pay for those services using taxpayer dollars appropriated by the North Carolina General Assembly and premiums paid by employees. In 2017, state taxpayers spent \$3.4 billion for the Plan, which is more than was appropriated for the entire University of North Carolina system.

It is our fiduciary duty to protect the participants of this plan and to the taxpayers of this state. To that end, we strongly urge you to fight for a delay or an outright repeal of the Health Insurance Tax (HIT) by supporting bipartisan legislation (H.R.5963) passed earlier this year by the U.S. House of Representatives.

As you know, the HIT (referred to by the Internal Revenue Services as the Health Insurance Provider Fee) is imposed as an additional tax on the fully insured market that serves most small business employers and those who purchase policies individually. The "fee" began as a fixed-dollar amount distributed across health insurance providers that began to rise according to an index based on net premium growth. The increased costs brought about by this unnecessary tax are ultimately delivered to employers and consumers as higher insurance premiums.

This legislation would provide a two year delay on the return of the health insurance tax until 2022. But until the measure passes both Chambers of Congress, the tax will return costing North Carolina's employers and consumers \$408 million in additional health insurance premiums, according to an analysis by actuarial firm Oliver Wyman. For seniors, those unexpected costs could be devastating despite careful planning and budgeting for their retirements.

Health plans are currently in the process of setting rates for 2020 premiums. So the time to act for 2020 is now. A moratorium means saving of approximately \$45 million for the Plan just from reduced premiums on providing insurance for 150,000 Medicare-eligible, retired state employees.

I strongly encourage you to take immediate action and delay or repeal this tax as quickly as possible. I ask that you support passage of the House legislation in the Senate so that it can be signed into law.

As new laws and regulations change the cost of doing business and impact our state's economy, we rely on you to stand up for all North Carolinians by eliminating this burdensome tax. I hope we can count on your support.

Sincerely,

*Dale R. Folwell, CPA*

Dale R. Folwell, CPA

**Anna Yount**

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**From:** Dale Folwell  
**Sent:** Thursday, November 29, 2018 2:10 PM  
**To:** Brenda Williams  
**Cc:** burleymitchell40@gmail.com; Anna Yount  
**Subject:** Re: Please check an aged UPD claim filed months ago by Judge Mitchell. Thanks

Thanks to all!!!

**Dale R. Folwell, CPA**  
NC State Treasurer  
Office of the State Treasurer  
Office: (919) 814-3807

3200 Atlantic Avenue, Raleigh, NC  
27604  
[www.NCTreasurer.com](http://www.NCTreasurer.com)

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On Nov 29, 2018, at 1:51 PM, Brenda Williams <[Brenda.Williams@nctreasurer.com](mailto:Brenda.Williams@nctreasurer.com)> wrote:

Judge Mitchell,

The claim was originally paid on 4/25/18. According to our records, you mailed the uncashed check back to us on 11/15/18 indicating that the bottom of the check had gotten damaged. A new check was reissued on 11/26/18. You should be receiving the reissued check within 7-10 business days.

Please let me know if you have any further questions.

**Brenda  
D.  
Williams**

Deputy  
Treasurer  
Unclaimed  
Property  
Division  
Office: (919)  
814-4207  
<image018.png>

3200 Atlantic Avenue, Raleigh, NC 27604  
<image013.png> [www.NCTreasurer.com](http://www.NCTreasurer.com)  
<image014.png><image015.png><image016.jpg><image017.png>

**Anna Yount**

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**From:** Dale Folwell  
**Sent:** Thursday, November 29, 2018 2:35 PM  
**To:** Jennifer Fletcher  
**Subject:** RE: Mission Health Comment Letter

How much money does the NCSHPan send to Mission and affiliates per year??

**Dale R. Folwell, CPA**

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**From:** Jennifer Fletcher [mailto:Jennifer.Fletcher@msj.org]  
**Sent:** Wednesday, November 28, 2018 10:17 AM  
**To:** Dale Folwell <Dale@Nctreasurer.com>  
**Cc:** Robert Jansen <Robert.Jansen@nctreasurer.com>  
**Subject:** Mission Health Comment Letter

*Sent on behalf of Paul McDowell, Chief Financial Officer, Mission Health*

Good morning,

Please find attached Mission Health's comment letter.

Thank you,

Jennifer Fletcher  
Office of Government &  
Community Relations  
Mission Health  
828.458.1972

**Anna Yount**

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**From:** Dale Folwell  
**Sent:** Thursday, November 29, 2018 2:48 PM  
**To:** walter@berothoil.com; jill.n.osborn@gmail.com  
**Subject:** Walter, Jill writes for the Courier and is comms director @ Summit School. Please get the photographers name at the banquet so she can have some good Bolton pictures.

**Dale R. Folwell, CPA**

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**Anna Yount**

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**From:** Dale Folwell  
**Sent:** Thursday, November 29, 2018 4:19 PM  
**To:** Butler, Jeff  
**Subject:** RE: NC Treasurer Dale Folwell/HIT

10 4

**Dale R. Folwell, CPA**

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**From:** Butler, Jeff [mailto:Jeff.Butler@mail.house.gov]  
**Sent:** Thursday, November 29, 2018 2:59 PM  
**To:** Dale Folwell <Dale@Nctreasurer.com>  
**Subject:** RE: NC Treasurer Dale Folwell/HIT

Treasurer Folwell,

Thank you for sharing. I will be sure to pass this along to Congressman McHenry.

Please stay in touch and let me know if the Congressman or I can ever be of assistance.

Best,  
Jeff

**From:** Dale Folwell <Dale@Nctreasurer.com>  
**Sent:** Thursday, November 29, 2018 1:38 PM  
**To:** Butler, Jeff <Jeff.Butler@mail.house.gov>  
**Subject:** NC Treasurer Dale Folwell/HIT

Jeff –