



AAIM 122nd Annual Meeting

September 21 – 25, 2013

Program Guide and Registration Information
Loews New Orleans Hotel

1 | WELCOME LETTER FROM THE PRESIDENT



Dear Colleague,

July 2013

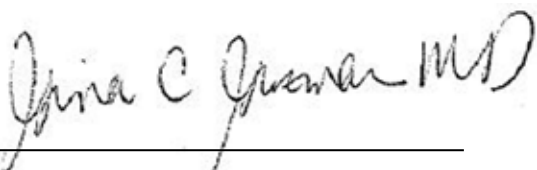
On behalf of the American Academy of Insurance Medicine, I have the pleasure of inviting you to join friends and colleagues in New Orleans, Louisiana, for our 122nd Annual Meeting, September 22 to 25, 2013. The Scientific Program Committee, under the diligent leadership of Program Chair, Dr. Justine Lee, has put together a fantastic array of current educational topics with which I am quite certain you'll be most pleased! This well-rounded program provides an excellent educational opportunity and is designed to appeal not only to experienced medical directors, but also to new medical directors and underwriters. The speaker listing includes several dynamic speakers and experts from across the country, faculty members from the Tulane University School of Medicine as well as several of our own industry experts.

We are fortunate to begin the program with an internationally recognized clinical investigator of cardiac imaging. This dynamic speaker and several year recipient of Tulane's Best Teaching Attending Award will delve into the nuances of Cardiac MRI and the role of MR imaging. You will then hear from one of the country's leading experts from Memorial Sloan-Kettering's Adult Long Term Follow-Up Program, one of the few programs in the nation committed solely to adult survivors of cancers. Other presentations not to miss include lectures on two impairments long considered to be uninsurable: human immunodeficiency virus (HIV) and chronic myelogenous leukemia (CML). We will hear updates regarding the amazing medical advances that have lengthened the survival of many of these individuals. We will also learn about the current European HIV coverage experience. The afternoon sessions will continue to be workshop-based to encourage smaller group discussions on disability, long term care, mortality, pathology, family history, as well as interpretation of treadmills and EKGs.

New Orleans is truly a wonderful and welcoming city and AAIM's 122nd Annual Meeting is an excellent opportunity for you to explore the many treasures this city has to offer. Our meeting is being held at the Loews New Orleans Hotel, a premier central location for all the action. The Loews has excellent meeting facilities and we will be the prime occupant at that time. Located near the Riverwalk, most rooms boast magnificent views of the mighty Mississippi River. We will also be within walking distance from the historic French Quarter, many jazz venues, the beignets of Cafe du Monde, and multiple world-renowned restaurants! There will be an opportunity on Sunday to take a New Orleans City Tour, so you can plan additional activities for the subsequent days.

Sunday's Welcome Reception will be held (weather permitting) at the Loews' beautifully restored outdoor Piazza d'Italia plaza and will feature classic New Orleans cuisine along with jazz music. The Farewell Dinner takes place at the National WWII Museum where you will have the opportunity to experience the war through the eyes of the men and women who lived it. Spouses/Guests will have an opportunity to learn the history of Mardi Gras at Mardi Gras World as well as learn New Orleans cooking techniques while eating and participating at a local cooking school demonstration.

It is my sincere hope that you will continue to support our organization by registering soon! You will benefit from the high-caliber educational programs consistent with AAIM's solid reputation while also enjoying the beautiful city with great people. My husband, Eric, and I along with our daughter, Katie, are looking forward to seeing you! Please take advantage of early registration and reserve your hotel rooms now!



Gina C. Guzman, MD, DBIM, FALU, ALMI
AAIM President, 2012-2013

DATE	ACTIVITY	TIME
SATURDAY, SEPTEMBER 21	Various Committee Meetings	Throughout the day
	Pre-Conference Course: Introduction to Insurance Medicine	7:45 am - 5:00 pm
	Pre-Conference Course: Basic Mortality Methodology	12:00 pm - 5:00 pm
SUNDAY, SEPTEMBER 22	Executive Council Meeting	7:30 am - 11:30 am
	Basic Mortality Methodology Course Continued	8:00 am - 12:00 pm
	Registration	12:00 pm - 6:00 pm
	Optional Event: New Orleans City Tour	1:30 pm - 4:30 pm
	Welcome Reception Piazza d'Italia, Loews New Orleans Hotel	6:00 pm - 8:00 pm
MONDAY, SEPTEMBER 23	Optional Event: Express Yoga	6:30 am - 7:15 am
	Registration	7:00 am - 5:00 pm
	Delegate Breakfast	7:00 am - 7:55 am
	Spouse/Guest Breakfast	8:00 am - 9:30 am
	Morning Scientific Sessions	8:00 am - 12:30 pm
	Optional Spouse/Guest Event: Mardi Gras Workshop and Lunch	9:45 am - 1:30 pm
	Delegate Lunch	12:30 pm - 1:30 pm
	Afternoon Breakout Sessions	1:30 pm - 4:15 pm
TUESDAY, SEPTEMBER 24	Optional Event: Express Yoga	6:30 am - 7:15 am
	Registration	7:00 am - 5:00 pm
	Delegate Breakfast	7:00 am - 7:55 am
	Spouse/Guest Breakfast	8:00 am - 9:30 am
	Morning Scientific Sessions	8:00 am - 12:20 pm
	Optional Spouse/Guest Event: New Orleans Cooking Experience	9:30 am - 2:00 pm
	Optional Spouse/Guest Event: French Quarter Walking Tour	10:00 am - 1:30 pm
	AAIM Luncheon and Business Meeting	12:20 pm - 1:45 pm
	Afternoon Breakout Sessions	1:45 pm - 4:30 pm
	Farewell Evening – National WWII Museum	6:30 pm - 10:30 pm
WEDNESDAY, SEPTEMBER 25	Optional Event: Express Yoga	6:30 am - 7:15 am
	Registration	7:00 am - 11:30 pm
	Delegate/Spouse/Guest Breakfast	7:00 am - 9:30 am
	Morning Scientific Sessions	8:00 am - 11:05 am

TRAVEL

BY AIR

The Loews New Orleans Hotels is a 20 minute drive from the Louis Armstrong New Orleans International Airport. Visit www.flymsy.com for airport information.

TAXIS

A cab ride from the airport to the Loews New Orleans Hotel costs \$33.00 for one or two persons, and \$14.00 (per passenger) for three or more passengers. Pick-up is on the lower level of the airport, outside the baggage claim area. There may be an additional charge for extra baggage. Rates are subject to change.

CAR RENTAL

There are 9 rental agencies with offices in the lower level of the airport. To get there, walk to the West Terminal Baggage Claim (Claims 12-14) and proceed outside the building. To your right is a covered walkway leading to the customer service building. Check with individual companies prior to arrival for rates and availability.

PARKING

Valet parking is available at the Loews New Orleans Hotel for \$39.00 plus tax per night, with in and out privileges.

AMERICANS WITH DISABILITIES ACT

The Loews New Orleans Hotel is accessible and usable by persons with disabilities. The hotel will provide aids or services that it has available or will attempt to provide such aids as required.

DRESS CODE

Business casual is appropriate for all scientific sessions. Please bring a sweater as the temperature in the meeting rooms may fluctuate. The Sunday reception will be business casual. For the Tuesday evening dinner we suggest smart business attire; jackets are optional.

WEATHER

The climate in New Orleans is humid subtropical, with temperatures in September ranging from 70°F to 87°F.

NON-SMOKING

All scientific sessions and social functions will be non-smoking.

PRESENTATION MATERIALS

In the spirit of sustainability, AAIM will not be providing delegates with hard copies of presentations. Presentations will be available for download from the AAIM conference website only. A specific link will be emailed out to registered delegates in early September, and the site will be updated with any revised presentations following the meeting.

For more information about the AAIM 122nd Annual Meeting, contact the AAIM Executive Secretary:

32 Colonnade Road, Unit 100, Ottawa, ON Canada K2E 7J6
Telephone: (613) 226-9601 / (888) 211-3204 (North America Only)
Fax: (613) 721-3581

Email: aaim@unconventionalplanning.com; Website: www.aaimedicine.org

LOEWS NEW ORLEANS HOTEL

300 Poydras Street
 New Orleans, Louisiana 70130 USA
 Hotel Direct: 504-595-3300
 Central Reservations: 866-211-6411
www.loewshotels.com/neworleans

Discover the Big Easy spirit at Loews New Orleans, located just three short blocks from the famed French Quarter and ideally situated for exploring the surrounding museums, entertainment and restaurants that New Orleans has to offer.

Hotel Amenities:

- In-room high-speed internet is available complimentary to AAIM guests
- All 285 guestrooms include bathrobes, down comforters and laptop-compatible safes
- Capture joie de vivre (the joy of life) and classic cocktails at the onsite Swizzle Stick bar, or sample some playful modern Creole cuisine at Café Adelaide
- Take advantage of the complimentary fitness center with indoor lap pool and spa tub
- 24-Hour room service is available

The AAIM 122nd Annual Meeting room rate for a Deluxe Room is **\$179.00 USD per room, per night (single or double occupancy)**, including complimentary high-speed internet in room. Rates are subject to federal, state, municipal and occupancy taxes.

Check-in time is 4:00 pm. Attendees may be checked in earlier depending on occupancy levels and availability of “ready” rooms. Check-out time is 12:00 pm.

A credit card is required to guarantee your reservation. Cancellations must be received 24 hours prior to arrival in order to avoid a charge of one night’s room and tax. Guests will be responsible for their own guestroom, tax and incidental charges upon checkout.

To book your accommodation online, go to www.aaimedicine.org and follow the link under “Meetings and Conferences”. To book by phone, call 1-866-211-6411 and ask for the AAIM Annual Meeting group rate.

The AAIM group rate is available until August 20, 2013 or until our group block is sold out. Reservations at the AAIM group rate MAY be available after that date, depending on availability.



MISSION STATEMENT

To provide Insurance Medical Directors with lifelong quality education that develops and increases knowledge, competence and professional skills used in life, health, disability and long-term care insurance. This will be accomplished through the offering of diverse educational activities including seminars, conferences, lectures, and workshops using effective learning methods as approved by the American Academy of Insurance Medicine.

The Academy will also endeavor to assist other organizations with an interest in insurance medicine and who provide quality education to their membership by providing joint sponsorship for approved programs.

GOALS

- To provide both new and experienced medical directors with the latest clinical and risk classification information for a wide variety of medical impairments.
- To present important topics from our Core Body of Knowledge that are not covered in other educational activities.

TARGET AUDIENCE

This course is designed for physicians, AAIM members, nurses, underwriters, and other insurance professionals with the requisite medical knowledge.

NEEDS ASSESSMENT

The landscape of medical care is ever changing. Knowledge is gained, technology is improved, life-spans are increased, and it can be exceedingly difficult for healthcare and insurance professionals to stay abreast of the latest breakthroughs in morbidity management. This activity will apprise participants of the latest in medical abilities and what it means for patients and their insurance.

PHYSICIANS

Dannemiller designates this live activity of a maximum of 16 AMA PRA Category 1 Credit(s) TM. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

DISCLOSURES

In accordance with the Accreditation Council for Continuing Medical Education (ACCME), Dannemiller requires that any person who is in a position to control the content of a CME activity must disclose all relevant financial relationships they have with a commercial interest. Accordingly:

- All faculty for these activities have reported any relationships with commercial interests and will make disclosures at the onset of each of their presentations.
- All others involved in the planning and development of this activity have reported any financial relationships with commercial interests.

To resolve identified conflicts of interest, the educational content was fully peer reviewed by a physician member of the Dannemiller Clinical Content Review Committee, Bernard Abrams, MD, who has nothing to disclose. The resulting certified activity was found to provide educational content that is current, evidence-based, and commercially balanced.

ACCREDITATION

This activity has been planned and implemented in accordance with the Essential Areas and policies of the Accreditation Council for Continuing Medical Education through the joint sponsorship of Dannemiller and AAIM. Dannemiller is accredited by the ACCME to provide continuing medical education for physicians. In order to receive CME credits, please complete and submit the evaluation form provided.

OFF LABEL DISCLOSURE

This educational activity may contain discussion of published and/or investigational uses of agents that are not indicated by the FDA. The opinions expressed in the educational activity are those of the faculty. Please refer to the official prescribing information for each product for discussion of approved indications, contraindications, and warnings. Further, attendees/participants should appraise the information presented critically and are encouraged to consult appropriate resources for any product or device mentioned in this program.

DISCLAIMER

The content and views presented in this educational activity are those of the authors and do not necessarily reflect those of Dannemiller or AAIM. This material is prepared based upon a review of multiple sources of information, but it is not exhaustive of the subject matter. Therefore, healthcare professionals and other individuals should review and consider other publications and materials on the subject.

Jointly Sponsored by Dannemille  **DANNEMILLER** and the American Academy of Insurance Medicine.



Saturday, September 21, 2013

COURSE LEAD

Charlotte Lee, MD, FLMI, DBIM

TARGET AUDIENCE

This course is designed for physicians, AAIM members, and other insurance professionals with the requisite medical knowledge and less than two years of experience.

NEEDS ASSESSMENT

Life and disability medical directors who are still early in their careers often lack the breadth of theory and insurance medicine knowledge to function effectively in their new positions. This activity aims to supplement these professionals' knowledge base with the latest, and most relevant insurance medicine information available. Through this interactive, case-based program the learners will gain knowledge of mortality patterns, ancillary tools used in risk assessment, and will explore some of the commonly-addressed impairments seen in the risk assessment process.

LEARNING OBJECTIVES

- Define the duties and expectations of the Medical Director
- Understand the basics of mortality patterns and how they are incorporated into formulating ratings (flat extras, permanent ratings, temporary extras)
- Recognize the function of the MIB and how it is integrated into coding for various impairments and diseases; understand how this function allows recognition of disease patterns and insurance activity
- Discuss the use of the insurance testing laboratories in the underwriting process
- Identify some of the more common and complex medical impairments seen by underwriters to include the fields of cardiology and oncology.
- Comprehend the framework for evaluation of disability underwriting and claims.

PHYSICIANS

Dannemiller designates this live activity of a maximum of 7.5 AMA PRA Category 1 Credit(s)[™]. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

REGISTRATION

This course is limited to the first eighteen (18) registrants with payment received. The fee for this activity includes lunch with the faculty and coffee breaks. Confirmation of registration and last-minute course details will be sent to registrants by e-mail by the AAIM Executive Secretary.

Questions specific to the Introduction to Insurance Medicine course content can be directed to Dr. Charlotte Lee at clee@caleemd.com or 913-706-851

Saturday and Sunday, September 21 and 22, 2013

COURSE INSTRUCTORS:

Tom Ashley, MD, FACP, DBIM
Martin Engman, MD, DBIM
Steve Riggati, MD, DBIM
David Winsemius, MD, DBIM, MPH

TARGET AUDIENCE

This course is designed for physicians, AAIM members, nurses, underwriters, and other insurance professionals with the requisite medical knowledge; however, priority will be given to medical directors.

NEEDS ASSESSMENT

The methodologies commonly used for mortality analysis are complicated and medical directors, as well as other healthcare personnel, often report these methodologies as being among their perceived practice gaps; a hindrance in their efforts to perform their duties. In this two day activity, participants will be guided through the intricacies of these methodologies and related tasks.

LEARNING OBJECTIVES

After completing this activity, the participant will better be able to:

- Execute appropriate mortality analysis.
- Perform life table calculations.
- Properly revise disease probability based on test results.
- Calculate mortality ratios and confidence intervals.
- Discuss select mortality ratios in depth.

PHYSICIANS

Dannemiller designates this live activity of a maximum of 8 AMA PRA Category 1 Credit(s)[™]. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

REGISTRATION

This course is limited to the first eighteen (20) registrants with payment received. Closing date for registration for this activity is August 9, 2013. Following receipt of the completed registration form and fee, course materials will be sent to each participant.

HOMEWORK ASSIGNMENT

Most of the education is self-learning in a structured assignment that typically takes 10-20 hours of student work. Preceptors are assigned and are available for email assistance. The homework assignment is to be completed and sent to the instructor at least three weeks prior to the course date. It must be received by August 30, 2013. The homework assignment is mandatory and makes up a significant component of the student's final grade. Assignment will be sent with syllabus following registration confirmation.

Questions specific to Basic Mortality Methodology course content can be directed to
Dr. Martin Engman at mlengman@medicalriskconsultants.com or (260) 486-7542
Dr. Tom Ashley at tashley@genre.com or (203) 352-3018

9 | OVERVIEW OF SCIENTIFIC PROGRAM

Below is the daily schedule, including faculty and learning objectives, as of July 5, 2013. Times, topics and speakers are subject to change.

MONDAY, SEPTEMBER 23

GREETINGS / BUSINESS

8:00am - 8:15am

Gina Guzman, MD, DBIM, FALU, ALMI

AAIM President

2nd Vice President & Medical Director, Munich Re, Chicago, Illinois

CARDIAC MRI/CTA/CORONARY CALCIUM SCORE

8:15am - 9:15am

Platform Speaker: **Paolo Raggi, MD, FACC, FACP, FASNC, FCCT**

Director, Mazankowski Alberta Heart Institute; Professor of Medicine,

Capital Health Chair in Cardiac Research, University of Alberta, Edmonton, Alberta

Learning Objectives:

- Explain the utility of MR for cardiac evaluation, how MR imaging works, what it tells us, what it doesn't. Provide some basic information on cost, access, and availability in the US and Canada.
- Summarize the role of MR imaging in cardiomyopathies. Review use for assessing differential diagnosis. For the most common types seen in insurance medicine (hypertrophic, dilated, right ventricular dysplasia, postpartum, "resolved" post viral), how can MR assist in determining prognosis.
- Describe the role of MR imaging in coronary heart disease. What information does MR provide about extent and anatomy of coronary artery obstruction. Explain how MR may assist in the evaluation of patients with coronary anomalies, muscular "bridges", and vasculitis. Can MR provide useful information in patients who have undergone revascularization procedures, either CABG or PTCA/stents.
- Compare/contrast cardiac MR with CT/CTA and ultrasound. Distinguish in what diseases or circumstances MR assists/adds information for diagnosis or prognosis.
- Describe the role of MR in coronary heart disease risk assessment. Can cardiac MR inform assessment in those at intermediate Framingham risk? Are CT/CTA/MR capable of adding prognosis information over and above conventional tests like exercise testing?
- Report on what we should expect from ongoing research into CT/CTA/MR in the next 2 to 5 years.

ADULT SURVIVORS OF CHILDHOOD CANCERS

9:15am - 10:15am

Platform Speaker: **Emily S. Tonorezos, MD-MPH**

Adult Long-Term Follow-Up Program, Memorial Sloan-Kettering Cancer Center, New York, New York

Learning Objectives:

- Identify the types of childhood cancers with the greatest probability of cancer survivors to adulthood.
- Describe the risk of recurrences of childhood cancers.
- Contrast the risk of malignancies in survivors of childhood cancers compared to general the population.
- Identify the long-term complications from treatments of childhood cancers.
- Discuss the morbidity and mortality implications from these long-term complications.
- Compare the mortality in adult survivors of childhood cancers with that of the general population.
- Describe the occurrence of disability in survivors of childhood cancers.

MONDAY, SEPTEMBER 23 (Continued)**BREAK****10:15am - 10:30am****UPDATE ON HIV MEDICINE****10:30am - 11:30am**Platform Speaker: **David Mushatt, MD**Chief, Adult Infectious Diseases Section, Tulane University School of Medicine,
New Orleans, Louisiana

Learning Objectives

- Review the epidemiology of HIV infection.
- Discuss the latest treatment approaches in HIV infection.
- Review the impact of antiretroviral treatments on mortality and longevity in HIV infection

HIV COVERAGE EXPERIENCE IN EUROPE**11:30am - 12:30pm**Platform Speaker: **Urs Widmer, MD, DBIM**

Vice President & Medical Director, Swiss Reinsurance Company, Zurich, Switzerland

Learning Objectives:

- Provide a risk selection approach to HIV infection using current CD4 counts, viral load, years on HAART and age.
- Provide a risk selection approach to HIV and HCV coinfection.
- Discuss previous and current recommendations and rationale for HAART initiation.
- Analyze the long term mortality risks of HIV infection discussing non-AIDS-related and AIDS-related causes of death.
- Demonstrate the value of disease cohort mortality analysis in comparison with insured lives in promoting fair risk assessment for insurance.
- HIV infection has become a manageable but not curable chronic disease; discuss current research regarding HIV cure and vaccines.

LUNCH**12:30pm - 1:30pm**

MONDAY, SEPTEMBER 23 (Continued)

BREAKOUT SESSION - DISABILITY MEDICAL UNDERWRITING

1:30pm - 2:45pm

Speakers:

John LoCascio, MD, DBIM

Vice President & Chief Medical Director, United Healthcare Specialty Benefits, Portland, Maine

Kim Minish, MD

Medical Director, Great-West Life Assurance Company, Winnipeg, Manitoba

Deborah VanDommelen, MD, MPH, DBIM

Medical Director, Northwestern Mutual, Milwaukee, Wisconsin

Moderator: **Lisa Papazian, MD**

Medical Director, Sun Life Financial, Wellesley Hills, Massachusetts

Learning Objectives:

- Understand the definition of “insurable risk” and why disability medical underwriting (u/w) both resembles and differs from life u/w.
- Understand the general structure and use of underwriting manuals, why manuals differ from company to company, and how to think about “best of case” and “worst of case”.
- Define “occupational disability” and the concepts of “Limitation” and “Restriction”.
- Understand how “individual and group”, and “long-term and short-term” disability medical u/w compare and contrast.
- Discuss the limitations inherent in disability data related to: causation, co-morbidity, and psychosocial factors; and why disability incidence and prevalence vary over time.
- Discuss defined risk (common tools: experience rating, postpone, exclude, decline).
- Understand “undefined risk” (common tools, rating, elimination periods, benefit periods, decline).
- Apply concepts in the context of specific case examples.

BREAKOUT SESSION - TST INTERPRETATION WORKSHOP

1:30pm - 2:45pm

Speaker: **Judy Finney, MD, FACC**

Associate Medical Director, Allstate, Northbrook, Illinois

Moderator: **James Goral, MD, DBIM**

Vice President & Medical Director, USAA Life Insurance Company, San Antonio, Texas

Learning Objectives:

- Explain how baseline ECG abnormalities affect TST interpretation.
- Define the criteria for normal, borderline and abnormal TST interpretation.
- Review the abnormal findings or arrhythmias seen during TST which may impact prognosis: pseudo-normalization or normalization of T waves, intermittent LBBB, second degree AVB, complex ventricular ectopy and hypotension.
- Define the reference ranges for HR recovery for various age bands.
- Define the criteria for hypertensive response and how it impacts prognosis.
- Review the predictors of mortality and poor prognostic findings.

MONDAY, SEPTEMBER 23 (Continued)**BREAK****2:45pm - 3:00pm****BREAKOUT SESSION - CASE STUDIES IN CHANNELOPATHIES****3:00pm - 4:15pm**Speaker: **Fabrice Chouty, MD**

Chief Medical Officer, Medical Director, Hanover Life-Re, Paris, France

Moderator: **Gina Guzman, MD**

2nd Vice President & Medical Director, Munich Re, Chicago, Illinois

Learning Objectives:

- Present case studies of channelopathies, and family history or ECG patterns suggestive of channelopathies.
- Summarize the different types of channelopathies (Long QT syndrome, Brugada syndrome, and anecdotal forms).
- Discuss the prognosis of different types of channelopathies.
- Discuss the mortality risk AICD implantation for primary or secondary purposes.

BREAKOUT SESSION - LTC: UNDERWRITING AND CLAIMS**3:00pm - 4:15pm**

Speakers:

Bruce Margolis, DO, MBA

Medical Director, Genworth Financial, Richmond, VA

Sheila MacDonnell, MD, MS

Medical Director, John Hancock, Boston, MA

Moderator: **Lisa Papazian, MD**

Medical Director, Sun Life Financial, Wellesley Hills, Massachusetts

Learning Objectives:

- Define the general philosophy of underwriting LTC insurance
Discuss coverage and class ratings.
Outline differences in risk between stand alone policy and LTC rider.
- Explain the claim adjudication process and how it differs from adjudication for Life.
- Review industry data regarding most common LTC Claims and contrast them to Life claims.
- Discuss underwriting and claims in relation to various case studies.

TUESDAY, SEPTEMBER 24

HEREDITARY COLON CANCER SYNDROMES

8:05am - 9:05am

Platform Speaker: **Jordan Karlitz, MD**

Assistant Professor of Medicine, Tulane Gastroenterology Clinic, New Orleans, Louisiana

Learning Objectives

- Survey familial colon cancer syndromes including those defined by diagnostic markers such as polyposis and family history.
- Discuss extra-colonic manifestations of these syndromes.
- Define the lifetime cancer risk for the various syndromes including available general population mortality data as available.
- Outline surgical & nonsurgical treatment modalities which alter the outcomes for survival and recurrence.

CONGENITAL HEART DISEASE

9:05am - 10:05am

Platform Speaker: **Maan Jokhadar, MD, FACC**

Assistant Professor of Medicine, Emory Adult Congenital Heart Center,
Emory Center for Adult Heart Failure Therapy, Atlanta, Georgia

Learning Objectives:

- Explain the natural history including mortality and morbidity concerns with lesions such as ASD, VSD, Tetralogy of Fallot, Transposition of Great Vessels, anomalous coronary arteries, anomalous pulmonary veins, etc.
- Discuss current standards of care regarding the above lesions.
- Review treatment influence on the natural history of these lesions.

BREAK

10:05am - 10:20am

PHARMACY AND ACTUARIAL PERSPECTIVES ON UNDERWRITING WITH PRESCRIPTION HISTORIES

10:20am - 11:20am

Platform Speakers:

Scott Whitmore, RPh

Director of Clinical Services, Milliman IntelliScript, Brookfield, Wisconsin

Eric Carlson, FSA

Life Actuary, Milliman IntelliScript, Brookfield, Wisconsin

Moderator: **Justine Lee, MD**

2nd Vice President & Medical Director, Gen Re, Stamford, Connecticut

Learning Objectives:

- Define the prescription marketplace and evaluate the utility of using prescription histories as part of the underwriting and claims process.
- Examine the sources of prescription drug profiles.
- Compare and contrast the efficiency and consistency of automated underwriting using case studies.
- Compare and understand relative mortality results for a typical life insurance company mapping of red, yellow, green drugs.
- Review interesting mortality results by individual drug and class derived from the Social Security Master Death File.
- Discuss and analyse mortality results of an automated prescription rules engine.

TUESDAY, SEPTEMBER 24 (Continued)**HEPATITIS B PLATFORM****11:20am - 12:20pm**Platform Speaker: **Luis Balart, MD**Professor of Medicine, Section Chief Gastroenterology & Hepatology,
Tulane University School of Medicine, New Orleans, Louisiana

Learning Objectives:

- Define the phases of chronic hepatitis B infections acquired in childhood versus adulthood and how to differentiate the different stages.
 - Discuss HBV DNA levels in the different stages of infection.
 - Discuss risk factors for mortality, cirrhosis, and hepatocellular carcinoma.
- Viral load may fluctuate; is it useful for prediction of HBV –related mortality?
- What other factors predict HBV-related mortality?
 - When are HBsAg titers used?
- Discuss the applications of HBeAg/Ab testing.
 - Review the timing and significance of HBeAg seroconversion and its relationship to prognosis.
 - Discuss the detection and significance of HBV mutations as they relate to prognosis.
- Define inactive carrier state according to current thought.
 - What is the probability of transformation to active necroinflammatory activity for inactive carriers?
 - What percentage of individuals remains inactive permanently?
 - Discuss the assessment of HBV in infants born to an HBsAg positive mother.
At what age is testing for recovery meaningful?
- Discuss the circumstance in which an HBsAg negative individual may actually be chronically infected.

BUSINESS LUNCH**12:20pm - 1:45pm****BREAKOUT SESSION - HEPATITIS B WORKSHOP****1:45pm - 3:00pm**Speaker: **Luis Balart, MD**Professor of Medicine, Section Chief Gastroenterology & Hepatology,
Tulane University School of Medicine, New Orleans, LouisianaModerator: **Laura Vecchione, MD**

Medical Director & 2nd Vice President, Gen Re, Stamford, Connecticut

Learning Objectives:

- Discuss briefly the appropriate management of chronic HBV in adults.
 - What are the criteria for anti-viral treatment?
 - Does viral genotype influence treatment?
 - How long should treatment be continued?
 - Is treatment ever curative? What are the criteria for sustained virologic response?
- Discuss the effect of anti-viral therapy on progression to cirrhosis, hepatocellular carcinoma, and mortality.
- Discuss the role of liver biopsy, including indications for biopsy and indications for repeat biopsy.
- Review non-invasive tests for cirrhosis including their reliability and clinical applications.
- Comment on the prevalence of disability attributable to liver disease in the different phases of HBV.
Are there professions in which chronic HBV is unacceptable?

TUESDAY, SEPTEMBER 24 (Continued)

BREAKOUT SESSION - CALCULATING MORTALITY RATIOS

1:45pm - 3:00pm

Speaker: **Mike Fulks, MD, DBIM**

Medical Consultant, Jackson, California

Moderator: **Lisa Papazian, MD**

Medical Director, Sun Life Financial, Wellesley Hills, Massachusetts

Learning Objectives:

- Deliver a presentation at a relaxed pace with time for questions and discussion, oriented to those who don't regularly do or critique research but have a need to use the results in their work or to evaluate other's interpretations.
- Review research data on laboratory testing to identify how results were generated, how comparable the study groups were to current applicants and what limitations may exist in translating those results for use in underwriting. A short list of studies to be referenced will be provided.
- Provide a limited review of statistical concepts with examples including relative risk and choice of an appropriate reference pool, multivariate analysis vs. conducting separate analysis by variables such as age and sex, and the gap between a statistical difference and a meaningful underwriting difference.
- Discuss the considerations in matching relative risk results from study data to attendees' proprietary underwriting classes including the issue of competing (and changing) causes associated with "all-cause mortality".

BREAK

3:00pm - 3:15pm

BREAKOUT SESSION - NEGATIVE FAMILY HISTORY: PREFERRED?

3:15pm - 4:30pm

Speaker: **Thomas Ashley, MD, FACP, DBIM**

Vice President, Chief Medical Director, Gen Re, Stamford, Connecticut

Moderator: **Justine Lee, MD**

2nd Vice President & Medical Director, Gen Re, Stamford, Connecticut

Learning Objectives:

- Review and critique the use of family history for preferred underwriting.
- Discuss the evidence on the reliability and utility of family history information.
- Present analysis of the possible mortality impact of adverse family history.

TUESDAY, SEPTEMBER 24 (Continued)**BREAKOUT SESSION - PATHOLOGY WORKSHOP****3:15pm - 4:30pm****Speaker: John Schmieg, MD**

Assistant Professor, Dept of Pathology, Tulane University School of Medicine, New Orleans, Louisiana

Steven Zimmerman, MD, DBIM

Vice President and Chief Medical Director, SCOR Global Life Americas, Charlotte, North Carolina

Moderator: Lisa Papazian, MD

Medical Director, Sun Life Financial, Wellesley Hills, Massachusetts

Learning Objectives:

- Define the general philosophy of reviewing pathology reports.
 - Review the various components of:
 - Bone marrow aspirate and biopsy
 - Flow Cytometry
 - Cytogenetic studies
 - Molecular studies
 - Outline a general approach to interpreting pathology reports.
 - Define the difference between a non-diagnostic bone marrow biopsy and a negative bone marrow biopsy.
- Discuss case studies with relevant pathology reports / bone marrow biopsies in relation to staging and prognosis / mortality risk. If new treatments improve prognosis, briefly outline the details.
 - Review a case of Anemia of Unknown Etiology.
 - Review a case of Early Myelodysplastic Syndrome.
 - Review a case of MGUS / Multiple Myeloma.
 - Review a case of Chronic Lymphocytic Leukemia/Small Lymphocytic Lymphoma (CLL/SLL).

WEDNESDAY, SEPTEMBER 25**CHRONIC MYELOGENOUS LEUKEMIA & STEM CELL TRANSPLANT****8:05am - 9:05am**Platform Speaker: **Hana Safah, MD**

Professor of Clinical Medicine; Director of the Heme-One Fellowship Program,
Tulane Cancer Center Clinic, New Orleans, Louisiana

Learning Objectives:

- Discuss the pathophysiology of CML and impact of medications, such as TKIs, and stem cell transplantation on its survival and recurrence.
- Define the disease and patient characteristics which affect the success of stem cell transplant in CML and other hematologic malignancies including complications post-transplant.
- Discuss late complications of stem cell transplant regimens such as secondary malignancy.

MELANOMA**9:05am - 10:05am**Platform Speaker: **Andrea Murina, MD**

Assistant Professor, Department of Dermatology, Tulane Medical Center, New Orleans, Louisiana

Learning Objectives:

- Describe the current epidemiology (rising incidence) of melanoma in the US.
- Cite pertinent risk factors for the development of melanoma including genetic predisposition.
- Review staging of melanoma and identify features that carry higher mortality risk (tumor thickness, mitotic rate, ulceration, LNs, satellite lesions and in transit, RT-PCR analysis, age, gender, anatomic location- (cutaneous, mucosal, ocular, acral), circulating melanoma cells, serum S-100 protein, gene expression profiling and proteomics).
- Discuss the long term survival of melanoma based on staging and the above characteristics.
- Relate current treatment approaches to impact on short and long term survival (surgery, adjuvant immunotherapy, radiation and molecularly targeted therapy for metastatic melanoma).

SYSTEMIC LUPUS ERYTHEMATOSUS**10:05am - 11:05am**Platform Speaker: **Stephen Derbes, MD, MPH**

Professor of Clinical Medicine, Tulane University School of Medicine, Clinical Immunology, Allergy and Rheumatology, New Orleans, Louisiana

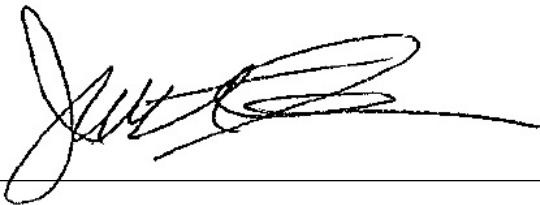
Learning Objectives:

- Compare and contrast prognosis for SLE of varying severity. List useful markers of disease activity.
- Discuss the impact of treatment on course of SLE, including immunomodulating drugs.
- Explain the favorable and unfavorable prognostic factors for SLE of varying severity.
- Discuss the morbidity and mortality associated with SLE, especially mild to moderate SLE.
- Discuss causes of death and unfavorable prognostic factors associated with death.

THANK YOU

It takes a team of dedicated people volunteering tremendous amounts of their time, energy, and expertise to plan an annual meeting filled with opportunities to learn from experts in clinical medicine and from experts in our industry. As Chair of the 2013 Scientific Committee, I extend my deepest appreciation and thanks to each person on the Scientific Committee:

Ashley Amerson	Continuing Education Project Manager Dannemiller	San Antonio, TX
J. Manuel Calero, MD	Medical Director New York Life Insurance Company	New York, NY
James Goral, MD	Chief Medical Director USAA Life Insurance Company	San Antonio, TX
Gina Guzman, MD	2nd Vice President & Medical Director Munich Re	Chicago, IL
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Lisa Papazian, MD	Assistant Vice President & Medical Director Sun Life Financial	Wellesley Hills, MA
Laura Vecchione, MD	2nd Vice President & Medical Director Gen Re	Stamford, CT



Justine Lee, MD
2nd Vice President & Medical Director, Gen Re, Stamford, CT
Chair, AAIM 122nd Annual Meeting Scientific Program Committee

19 | SOCIAL ACTIVITIES AND TOURS

Social activity descriptions are valid as of July 5, 2013 and are subject to change. All social activities are subject to a minimum number of participants and may need to be changed or cancelled. In the event of cancellation, participants will be notified in writing and a full refund will be issued. Tours operate rain or shine.

SUNDAY, SEPTEMBER 22

NEW ORLEANS CITY TOUR

1:30pm - 4:30pm

Travel through three centuries of history, legends and romance as you encounter “The City That Care Forgot!” Join us for this three-hour city tour by private motor coach.

Absorb the sights and sounds of the world-famous French Quarter and historic Jackson Square, home of the Cabildo and Presbytere Museums. This tour will include a stop at one of the historic cemeteries, referred to as “Cities of the Dead,” where you will learn about this unique above-ground burial system and the culture of jazz funerals.

City Park’s many attractions, including the New Orleans Museum of Art, Morning Call Café, a sculpture garden, botanical garden, and amusement park and more, are nestled among the shadows of the largest collection of ancient oak trees. Stone foot bridges cross lagoons in this picture-perfect setting in 1,300 lush acres.

Marvel at stories of voodoo and piracy on Bayou St. John, the waterway used by Jean Lafitte and his band of pirates. View the longest bridge over water in the world, the Lake Pontchartrain Causeway. Follow the path of the St. Charles Avenue streetcar, the oldest continuously operating passenger railway system in the world (until service was disrupted by Hurricane Katrina). See the homes of former Kings and Queens of Mardi Gras, stately mansions and the world-famous, exclusive Garden District.

Maximum: 55 participants

Recommended attire: casual clothing appropriate for the weather on the day, casual footwear

Price: \$50.00 USD



MONDAY, TUESDAY, WEDNESDAY (SEPTEMBER 23, 24, 25)

EXPRESS YOGA

6:30am - 7:15am

In the spirit of wellness – an early morning energizer... Calm the mind, strengthen the body and feed the soul. You are welcome to join a complimentary easy yoga class. All levels are welcome. The yoga class will take place at the Loews New Orleans Hotel.

Maximum: 20 participants

Recommended attire: loose, comfortable clothing

Price: no charge (includes instructor, yoga mats, bottled water)

Social activity descriptions are valid as of July 5, 2013, and are subject to change. All social activities are subject to a minimum number of participants and may need to be changed or cancelled. In the event of cancellation, participants will be notified in writing and a full refund will be issued.

MONDAY, SEPTEMBER 23

MARDI GRAS WORKSHOP AND LUNCH

9:45am - 1:30pm

Come see where Mardi Gras is made! This exclusive all-access one-hour tour will take the mask off Mardi Gras. A knowledgeable guide will highlight the history and significance of Mardi Gras in New Orleans and showcase the art as you tour through the working studios where artisans and craftsmen have worked year-round to design and build the spectacular floats and props since 1947. Watch the artists painting and sculpting right before your eyes. Learn about the history and culture of New Orleans through the wonder of this unique and festive tradition. Enjoy a display of Mardi Gras costumes, a historic video and a slice of the famous King Cake!

Explore more of the artistic side of Mardi Gras! After learning a brief history about masking in New Orleans, you will get to make your very own one of a-kind creation! This one-hour workshop allows you to create a Mardi Gras mask to take home. There are different styles of base masks to choose from, as well as feathers, beads, rhinestones, ribbon, paint and anything else needed to embellish your Carnival creation. For those who would like more direction, there are example masks that the guides can help you recreate.

This activity will end with a relaxing lunch at one of New Orleans' favorite restaurants.

Maximum: 25 participants

Recommend attire: casual clothing and footwear

Price: \$120 USD (includes return transportation, guided tour, mask-making workshop, lunch)

TUESDAY, SEPTEMBER 24

NEW ORLEANS COOKING EXPERIENCE

9:30am - 2:00pm

Creation of a four-course traditional New Orleans meal will be taught during this 2½ hour cooking class. The class will be taught in the residential kitchen with participants seated at the chef's workstation and cooking island. The meal will be served following the class in the lovely dining room. Written recipes will be provided for all menu items presented.

Our Chef for the afternoon, Gerard Maras, has helped shape the new Creole cuisine of New Orleans since 1981, when he arrived to work at Commander's Palace. The Brennan family soon recognized his brilliance and creativity and had him create the menu for their first Louisiana bistro restaurant, Mr. B's. Today, Gerard's BBQ Shrimp and Jumbo Lump Crab Cakes are among Mr B's most popular and most classic dishes.

From 1998 through 2002, "Gerard's", Chef Maras' own restaurant was the toast of New Orleans. Many of today's most acclaimed young chefs were trained at Gerard's, since he is known as a generous teacher with a special touch for nurturing and inspiring young apprentices. After designing the state of the art kitchen at Ralph's on the Park, and, along with Ralph Brennan, creating Ralph's distinctive menu, Gerard and his wife Tommie concentrated on their family farm located on the North Shore of Lake Pontchartrain. A class with Chef Gerard is often noted for the fresh yard eggs and special "fresh picked" ingredients from the farm.

Maximum: 12 participants

Recommend attire: casual clothing and footwear

\$175 USD (includes return transportation, cooking class, lunch)

TUESDAY, SEPTEMBER 24**FRENCH QUARTER WALKING TOUR****10:00am - 1:30pm**

Enjoy a historic New Orleans walking tour of the French Quarter where fact meets folklore on the storied Creole streets where legend and documented history converge. From the dynamic Mississippi River to the serene courtyards, explore the Vieux Carre with your local guide. Discover everything from the outrageous colonial history to Creole culture, from piracy to architectural masterpieces, enjoying New Orleans' gumbo of legend and truth. Lunch will follow at a restaurant in the French Quarter.

Maximum: 20 participants

Recommended attire: casual clothing appropriate for the weather on the day, comfortable secure footwear, hat (a rain coat for the rain, an umbrella for the sun)

Price: \$60 USD (includes guide, lunch)



*The Sunday Welcome Reception and the Tuesday Farewell Dinner are included as part of the registration fee for Members, Non-Members, Emeritus, Underwriters and registered Spouse/Guest. Additional tickets may be purchased. Please see the registration form for details.

SUNDAY, SEPTEMBER 22

WELCOME RECEPTION

6:00 pm - 8:00 pm

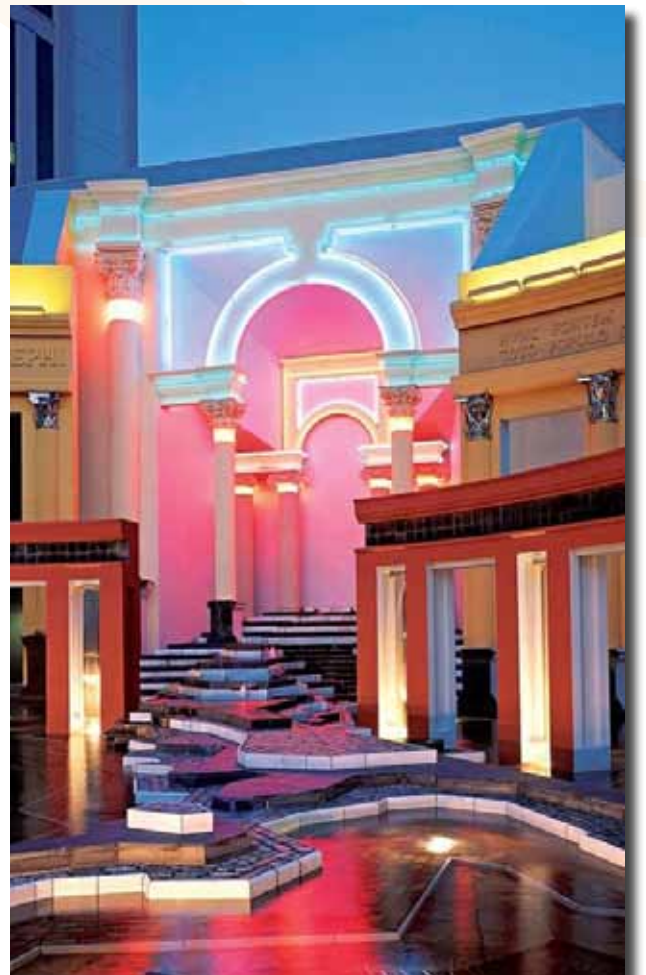
Start the week off with an evening of socializing with colleagues and making new acquaintances at the Piazza d'Italia, a local treasure designed by post-modernist architect Charles Moore. Revel in a mix of New Orleans jazz and classic jazz standards by the Garden District Trio, surrounded by the outdoor fountains and vibrant columns of the restored Piazza.

TUESDAY, SEPTEMBER 24

FAREWELL DINNER

6:30 pm - 10:30 pm

Step back into a bygone era at The National WWII Museum. We will have the opportunity to tour the exhibits of the Louisiana Memorial Pavilion and Galleries, which tell the stories of dozens of amphibious landings – including the Normandy Invasion – and thousands of men and women who made Allied victory in World War II possible. Our featured entertainment for the evening is The Victory Belles, a charming vocal trio who will take you on a nostalgic journey through World War II-era musical classics.



Thank you to our supporters who have confirmed to date:



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