



**Registration
Now Open!**



AAIM 125th Annual Meeting

Sunday, September 25 - Wednesday, September 28, 2016

The Westin Austin Downtown

Austin, Texas

Visit www.aaimedicine.org for updates

WELCOME LETTER FROM THE PRESIDENT



Dear Colleague,

June 2016

On behalf of the American Academy of Insurance Medicine, I have the pleasure of inviting you to join friends and colleagues at The Westin Austin Downtown Hotel in Austin, Texas, for our historic 125th Annual Meeting, September 25 to 28, 2016. The Scientific Program Committee, under the diligent leadership of Dr. Lisa Papazian, has assembled an outstanding array of topics that will appeal to the varied experience level of attendees. We have enlisted speakers with clinical backgrounds as well as a number of insurance industry experts.

This year, the Program Committee examined AAIM member feedback from a survey conducted last year and decided to delve into that feedback and utilize it in the planning of this meeting. In that survey, the membership voiced concerns about the future of insurance medicine, the impact of the Big Data movement and what the role of the medical director will be going forward. It is only fitting that for the 125th annual program, we'll begin with one of our own, Dr. Bruce Margolis, who will open our session paired with ACLI attorney Mariana Gomez-Vock with a dynamic presentation about the value that Medical Directors bring to the industry. There will be a panel discussion on the Future of Insurance Medicine. The program will also include multiple sessions by industry experts on mortality analysis as well as a practical session specifically designed for Medical Directors on their role in Big Data and Predictive Analytics. We're also trying something new based upon feedback from AAIM members by introducing a session geared towards the business aspects of being a contracting Medical Director, with a panel that includes a well-known employment attorney who is familiar with the insurance industry. In 2015 those of you who attended the AAIM Triennial had the opportunity to listen to a fascinating industry panel discussion on the insurability of HIV. This year, we will follow up on that discussion with a platform presentation by an Infectious Disease HIV Specialist and an industry Medical Director who has experience in the analysis of HIV Insurability. We have sessions on CAR T-Cell therapy for malignancy by Dr. Rayne Rouse from the Baylor

College of Medicine, Congenital Heart Disease in Adults by the Director of the Adult Congenital Heart Disease Program at Texas Children's Hospital, and a discussion about pandemics by Dr. James LeDuc, the Director of the Galveston National Laboratory, the largest active biocontainment facility on a US academic campus.

This is AAIM's first visit to Austin, a dynamic city with much to see and do! The Westin Austin Downtown Hotel is a new boutique hotel and our group will be the main occupant. The meeting spaces are close together and well laid out. The staff is friendly and helpful. Our hotel is situated right downtown, close to the musical hub of the city on 6th Street, as well as a short walk from the studio that hosts Austin City Limits, the longest-running live music series in American television history. Austin is host to an abundance of chef-driven restaurants, food trucks, the LBJ Library and Museum, art galleries and the natural beauty of the hill country. If you're crazy about bats, please head to the Congress Avenue Bridge to watch the Mexican Free-tailed bats at sunset. We have assembled a delightful array of events for meeting attendees and their guests, including a tour of the city, an opportunity to kayak on Lady Bird Lake, visit the Lady Bird Johnson Wildflower Center, or go on the Wimberley Art & Wine Tour. In addition, for those individuals who have a culinary curiosity, we are offering a Monday night Hybrid Food Tour that will include a well-known restaurant as well as several of Austin's food trucks. If you are into yoga, please enjoy morning yoga classes on the 20th floor rooftop pool deck overlooking the city.

The Sunday night Welcome Reception will be held in the lovely ground floor lobby and bar area of our hotel. You'll be able to catch up with old friends and make some new acquaintances while sampling some of the interesting cuisine that Austin is known for. Our Tuesday Farewell Dinner will be held in a unique, fun, and casual location that offers both indoor and outdoor dining. We'll have live music and some surprising fun outdoor activities. The temperatures in Austin in late September will likely be in the mid-80s, so plan accordingly.

I'm excited about the program that we're offering this year! Please support our wonderful organization that consistently delivers a high quality educational program along with the warmth of a supportive and friendly group of industry peers.

I hope to see you in Austin!

Karen Blackstone, MD, DBIM
AAIM President 2015-2016



CELEBRATE AAIM'S HISTORY



These are photos of Farewell Dinners held in 1936, 1941 and 1950. In Austin, Texas, AAIM will celebrate its 125th Anniversary. Please send us your photos from AAIM Annual Meetings to help us celebrate the history of our organization and marvel at the enduring success of AAIM. Send your photos to aaim@unconventionalplanning.com.

AAIM 125TH ANNUAL MEETING – PROGRAM OVERVIEW

Schedule as of July 25, 2016. Times, topics and speakers are subject to change.

DATE	ACTIVITY	TIME
SUNDAY, September 25	Registration and Information Desk	12:00 – 18:00
	Pre-Conference Course: Basic Mortality Methodology	08:00 – 17:00
	Welcome Reception	18:00 – 20:30
	Registration and Information Desk	07:00 – 16:45
	Delegate Breakfast	07:00 – 07:45
	Greetings/Business and Recognition of the History of AAIM	07:45 – 08:05
	Platform: The Value of Insurance Medical Directors	08:05 – 09:00
	Platform: Pandemics and the Insurance Company Medical Director	09:10 – 10:10
	Refreshment Break	10:10 – 10:30
	Platform: Congenital Heart Disease in Adults	10:30 – 11:30
MONDAY, September 26	Platform: Brain Injury, the Post-Concussive State and Chronic Traumatic Encephalopathy	11:40 – 12:40
	Lunch	12:40 – 14:00
	Concurrent Panel: The Future of Insurance Medicine	14:00 – 15:15
	Concurrent: Hereditary Cancer Syndromes	14:00 – 15:15
	Concurrent Panel: Disability Claims Discussion	14:00 – 15:15
	Refreshment Break	15:15 – 15:30
	Concurrent Panel: The Business of Being a Contracting Insurance Medical Director	15:30 – 16:45
	Concurrent: Hereditary Cancer Syndromes (Repeat)	15:30 – 16:45
	Concurrent Panel: Disability Claims Discussion (Repeat)	15:30 – 16:45
	FREE EVENING	
TUESDAY, September 27	Registration and Information Desk	07:00 – 16:45
	Delegate Breakfast	07:00 – 07:45
	Greetings / Business	07:45 – 08:00
	Platform: Targeted Cancer Immunotherapy	08:00 – 09:00
	Platform: Update on Hepatitis C	09:10 – 10:10
	Refreshment Break	10:10 – 10:30
	Platform: Blood Pressure Ratings vs. Actual Risk, A Growing Disparity	10:30 – 11:30
	Platform: Interstitial Lung Disease and Pulmonary Hypertension	11:30 – 12:30
	Business Meeting / Lunch	12:30 – 14:00
	Concurrent: Mortality Analysis Made Easier – Using Modern Tools to Streamline the Analysis of Survival Data	14:00 – 15:15
	Concurrent: Big Data's Role in Insurance Medicine	14:00 – 15:15
	Concurrent: Kidney Disease	14:00 – 15:15
	Refreshment Break	15:15 – 15:30
	Concurrent: Mortality Analysis Made Easier – Using Modern Tools to Streamline the Analysis of Survival Data (Repeat)	15:30 – 16:45
	Concurrent: Big Data's Role in Insurance Medicine (Repeat)	15:30 – 16:45
Concurrent: Kidney Disease (Repeat)	15:30 – 16:45	
Farewell Dinner	18:30 – 22:00	
WEDNESDAY, September 28	Registration and Information Desk	07:00 – 11:15
	Delegate Breakfast	07:00 – 07:55
	Greetings / Business	07:55 – 08:00
	Platform: Updates in Rheumatology	08:00 – 09:00
	Platform: Updates in HIV	09:00 – 10:00
	Refreshment Break	10:00 – 10:15
Platform: Oncology – IPNM and Other Pancreatic Neoplasms	10:15 – 11:15	

GENERAL INFORMATION

Air Travel

The Westin Austin Downtown is located about 20 minutes from the Austin-Bergstrom International Airport (AUS), which is served by all major domestic and international carriers. Visit www.austintexas.gov/airport/ for airport information.

Taxis

A cab ride from the airport to the Westin Austin Downtown is approximately \$34 USD for one or two passengers. Surcharges may apply for additional passengers. Pickup is on the lower level outside the baggage claim area in front of Areas K to J. There may be an additional charge for extra baggage. Rates are subject to change without notice.

Car Rental

The airport has a Consolidated Rental Car Facility which is accessed by two pedestrian bridges from the upper level/ticketing area. Walk across one of the pedestrian bridges and follow the signs to the Rental Car Facility. The East end pedestrian bridge is closest to the rental car facility and check-in is on the second floor.

Level 1: Hertz, Dollar, Thrifty

Level 2: National, Alamo, Enterprise, Fox, E-Z Rent-A-Car

Level 3: Avis, Budget, Advantage, Payless

Parking

Valet parking is available at the Westin Austin Downtown for USD \$40 USD per night.

Americans With Disabilities Act

The hotel is compliant with the Americans with Disabilities Act. ADA-compliant guest rooms are available.

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 casual attire.

Weather

The climate in Austin is humid sub-tropical, with temperatures in late September ranging from 66°F to 88°F.

Non-Smoking

All scientific sessions and social functions will be non-smoking. All guest rooms and public spaces at the Westin Austin Downtown are 100% smoke-free.

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 125th Annual Meeting,
contact the AAIM Executive Secretary:**

32 Colonnade Road, Unit 100, Ottawa, ON Canada K2E 7J6

Telephone: (613) 226-9601 / (888) 211-3204

Fax: (613) 721-3581

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

ACCOMMODATION

The Westin Austin Downtown

310 East 5th Street

Austin, TX 78701 USA

Hotel Direct: 1-512-391-2333

Toll-free to Central Reservations: 1-800-937-8461

www.westinaustindowntown.com

The Westin Austin Downtown Hotel is one of the premiere downtown Austin hotels, located one block from the **Austin Convention Center** and the **6th Street Entertainment District**, just footsteps to the latest foodie hotspots, historic sites, legendary live music venues, eclectic shops and year-round outdoor fun.

Hotel Amenities:

- Wireless high-speed Internet access in all guest rooms is complimentary for AAIM guests
- All 366 guestrooms feature the famous Heavenly Bed[®], in-room safe, work desk with ergonomic chair, iHome[®] docking station, and fresh brew Starbucks[®] coffee and Tazo tea
- Complimentary wireless high-speed Internet access in the lobby
- 24-hour WestinWORKOUT[®] Fitness Studio
- runWestin[™] Program
- WestinWORKOUT[®] Gear Lending Program
- Drycleaning service
- Business Center
- **Stella San Jac**, a full-service restaurant and bar, offers an eclectic Austin-American menu featuring an open kitchen and outdoor seating, as well as a bar and lounge that hosts local musicians on a weekly basis
- Heated outdoor rooftop pool and bar, **Azul**, offers lovely views of downtown Austin where you can relax poolside with a handcrafted cocktail.

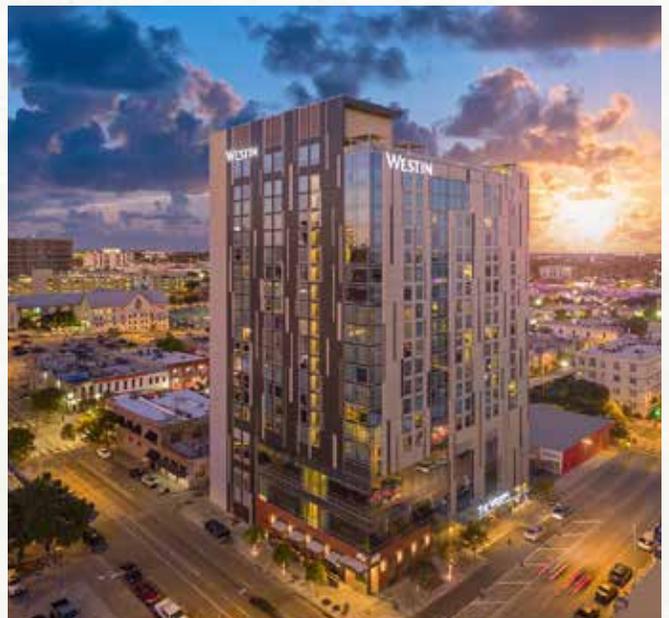
The AAIM 125th Annual Meeting room rate for a Traditional Room is **\$229 USD per room, per night (single or double occupancy)**, including complimentary basic wireless Internet in room. Rates are subject to federal, state, municipal and occupancy taxes.

Check-in time is 3:00 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 1-512-391-2333 and ask for the Reservations Department – be sure to indicate that you would like the AAIM Annual Meeting group rate.

The AAIM group rate is available until August 23, 2016 or until our group block is sold out, whichever comes first. Reservations at the AAIM group rate MAY be available after that date, depending on availability.



THE AMERICAN ACADEMY OF INSURANCE MEDICINE EDUCATIONAL MISSION

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 for a maximum of **26.5 AMA PRA Category 1 Credit(s)[™]**. 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 accreditation requirements and policies of the Accreditation Council for Continuing Medical Education (ACCME) through the joint providership 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 Provided by Dannemiller  **DANNEMILLER** and the American Academy of Insurance Medicine.

THANK YOU

To all of my hardworking and dedicated Scientific Program Committee friends: Thank you! It has been such a pleasure working with you all, a very talented, creative and fun group of people. Collectively, we have created a wonderful, thoughtful, interesting, and educational 2016 AAIM Meeting. Thank you for your contributions!

Lisa Papazian, MD, DBIM

AVP & Medical Director

Sun Life Financial, Wellesley Hills, MA

Chair, AAIM 125th Annual Meeting Scientific Program Committee

Karen Blackstone, MD, DBIM	President Blackstone Relative Risk, LLC	Shorewood, MN
Mark Bell, MD, DBIM	AVP & Medical Director Lincoln Financial Group	Hartford, CT
J. Manuel Calero, MD	Medical Director New York Life Insurance Company	New York, NY
Jennifer Hodge	Continuing Education Project Manager Dannemiller	San Antonio, TX
Theresa Koester, MD, DBIM	Associate Medical Director Western & Southern Financial Group	Cincinnati, OH
Sheila MacDonnell, MD, DBIM	AVP & Medical Director John Hancock	Boston, MA
Paul Nittoli, MD, DBIM	Medical Director Mass Mutual Financial Group	Springfield, MA
Georgiana Pascutiu, MD, DBIM	Medical Director RGA International Corporation	Toronto, ON
Barbara Senatore, MD	Medical Director New York Life Insurance Company	New York, NY
Nicole Simpson, MD, MPH, DBIM	Medical Director Mass Mutual Financial Group	Springfield, MA
Tim Steffen, MD	VP & Medical Director Ameritas	Cincinnati, OH
Michael Wetzel, MD, CLU	VP & Medical Director Prudential Financial	Plymouth, MN
John White, MD, MBA, FLMI, DBIM	Senior Vice President American National Insurance Company	Galveston, TX
Monica Wilson, MD	VP & Medical Director Swiss Reinsurance Company Limited	Toronto, ON

BASIC MORTALITY METHODOLOGY COURSE

Sunday, September 25, 2016

08:00 – 17:00

Course Instructors:

- Tom Ashley, MD, FACP, DBIM
- Brad Heltemes, MD, DBIM
- Cliff Titcomb, MD, DBIM
- Martin Engman, MD, DBIM
- Steve Rigatti, MD, DBIM,

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 one-day activity, participants will be guided through the intricacies of these methodologies and related tasks.

Learning Objectives

Students will gain an improved understanding of:

- population life tables
- mortality curves and life expectancy calculations
- select and ultimate mortality rates
- common patterns for diseases and other health-related conditions and rating approaches
- sensitivity, specificity and predictive values
- mortality methodology calculations
- value and limitations of examinations, laboratory testing and other diagnostic methods
- the use of spreadsheets to perform repetitive calculations
- the interpretation of Cox survival models presented in the literature
- the use of computer spreadsheet programs to speed and automate the necessary calculations
- optimal use of Internet resources to obtain relevant literature and data

Please note: The course contains approximately 4 hours of online video lectures which registrants will receive as a link with a password upon registration. Also, completion of this course will require use of computer spreadsheets, specifically Microsoft Excel. Introductory materials and references to other foundational resources will be provided.

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 twenty (20) registrants with payment received. The closing date for registration for this activity is **August 15, 2016**. 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 September 2, 2016. The homework assignment is mandatory and makes up a significant component of the student's final grade. The assignment will be sent with the syllabus following registration confirmation.

Questions specific to Basic Mortality Methodology Course content can be directed to:

Dr. Steve Rigatti at srigatti@massmutual.com; (413) 744-8539.

OVERVIEW OF SCIENTIFIC PROGRAM

*Daily schedule as of July 25, 2016. Times, topics and speakers are subject to change.

MONDAY, SEPTEMBER 26, 2016

07:45 – 08:05 **Greetings / Business**

Recognition of the 125th Anniversary of AAIM

Karen Blackstone, MD, DBIM

President, Blackstone Relative Risk, LLC, Shorewood, Minnesota

AAIM President

08:05 – 09:00 **Platform: The Value of Insurance Medical Directors**

Bruce Margolis, DO, MBA, CHIE

Medical Director, Insurance Services, Clinical Reference Laboratory, Lenexa, Kansas

Mariana Gomez-Vock

Senior Counsel, American Council of Life Insurers, Washington, DC

Learning Objectives:

- To review the historical role of the Insurance Medical Director; role of AAIM
- To outline the changing spheres of influence over time– from within to without
- To review the key medical issues faced by the industry (past, present, future) and the role of the Medical Director in shaping outcomes:
 - HIV
 - Genetics
 - Big Data
- To review the role of the Medical Director within the ACLI – historical and current:
 - Risk Classification Committee
 - Genetics Subcommittee (past)
 - Genetic Testing Task Force
 - Data Analytics Task Force
 - Medical Issues Committee (Medical Section)
- To discuss the role of the Medical Director at legislative and non-legislative hearings:
 - Examples: GINA (HHS), MD, FL, Uniform Law Commission, etc.
 - What has worked; what hasn't
 - Where are the current challenges amongst various stakeholders – legislative, non-legislative and the general public

09:10 – 10:10 **Platform: Pandemics and the Insurance Company Medical Director**

James LeDuc, PhD

Director, Galveston National Laboratory, Institute for Human Infections & Immunity, Galveston, Texas

Learning Objectives:

- Understand the current pandemic threats and what our National Laboratories are doing to diagnose, treat, and aid in these;
- Understand the current and long-term mortality implications of pandemics now and on the horizon;
- Be able to assist their corporations as the Medical Officer and expert in their approach to Employee Welfare during times of pandemics to help prevent spread, understand treatment, and counsel appropriate corporate responses.

10:10 – 10:30 Refreshment Break

10:30 – 11:30 **Platform: Congenital Heart Disease in Adults**

Wayne Franklin, MD
Associate Professor of Cardiology, Internal Medicine and Pediatrics
Texas Children's Hospital, Baylor St. Luke's Medical Center, Houston, Texas

Learning Objectives:

- Discuss the common forms of congenital heart disease such as ASD, VSD, Tetralogy of Fallot, Transposition of the Great Vessels, anomalous coronary arteries, etc.;
- Describe manifestations of congenital heart disease in adults;
- Discuss the current standards of care for adults with congenital heart disease;
- Address the morbidity and mortality of the various conditions in adulthood.

11:40 – 12:40 **Platform: Brain Injury, the Post-Concussive State, and Chronic Traumatic Encephalopathy**

Richard Temple, PhD
Clinical Psychologist, Austin, Texas

Learning Objectives:

- Provide an overview of acquired brain injury including symptoms and classification;
- Review the clinical tools for assessing brain injury and the post-concussive state;
- Review the neurocognitive findings in brain injury that affect long-term morbidity and mortality;
- Discuss clinical findings during a brain injury evaluation that suggest malingering;
- Discuss the diagnosis of cumulative traumatic encephalopathy: its clinical characteristics; its associations with sports and trauma; and any data on how duration of exposure relates to future risk.

12:40 – 14:00 **Lunch**

14:00 – 15:15 **Concurrent Panel: The Future of Insurance Medicine**

Moderator: Michael Wetzel, MD, CLU
VP and Medical Director, Prudential Financial, Plymouth, Minnesota

Karen Blackstone, MD, DBIM
President, Blackstone Relative Risk, LLC, Shorewood, Minnesota

Nicole Simpson, MD, MPH, DBIM
AVP and Medical Director, Life Underwriting Medical Department
USIG PM, Underwriting Policy and Strategy, MassMutual Financial Group, Springfield, Massachusetts

Cliff Titcomb, MD, DBIM
VP and Chief Medical Director, Hannover Life Reassurance Company of America, Denver, Colorado

John White, MD, MBA, FLMI, DBIM
Senior Vice President, American National Insurance Company, Galveston, Texas

Learning Objectives:

- Discuss the present and future challenges facing the Insurance Medical Director;
- Discuss the present and future opportunities facing the Insurance Medical Director;
- Explore the changing role of the Insurance Medical Director;
- Outline potential skills that fall outside the traditional case consult review;
- Discuss how to obtain and leverage these skills to remain a valued member of the corporate team;
- Discuss what advice to give to a newer Medical Director;
- Review the challenges of working remotely.

14:00 – 15:15 **Concurrent: Hereditary Cancer Syndromes**
Loraine Oman-Ganes, MD, FRCPC, CCMG, FACMG
Chief Medical Director, Sun Life Financial, Toronto, Ontario

Learning Objectives:

Using Case examples to illustrate:

- A principles-based approach for analysis of the most common hereditary cancer syndromes: Hereditary breast/ovarian cancer syndromes and Lynch syndrome
- Interpretation of genetic test results including variants of unknown significance (VUS), and predictive value of negative test results.
- Underwriting analysis for Life and Living Benefits products where the diagnosis is uncertain or genetic test results are not available.
- Assessment of the insurer's family history and clinical clues

14:00 – 15:15 **Concurrent Panel:**
Disability Claims Workshop: Strategies, Tools, and Tips to use when evaluating complex claims.

Charlotte von Bodelschwingh, MD
Medical Consultant, Munich Re, Munich, Germany

John Locasio, MD, ABIM, FACP, FAADEP
VP and Chief Medical Officer, United Health Care Financial Protection, Portland, Maine

Learning Objectives:

- A discussion of 3 complex medical conditions routinely encountered during disability claim referrals.
 - Chronic Pain
 - Chronic Fatigue
 - Mood disorders
- Define Limitations and Restrictions
- Understand the importance and need to identify the insured's functional abilities rather than depend on the insured's clinical diagnosis or even lack of diagnosis to determine support for limitations and restrictions.
- Discuss the indications of neurocognitive testing and the utility of obtaining personality testing.
- Discuss subjective and mixed subjective/objective claims
 - Somatization as an alternative explanation for symptoms-in-excess-of-objective-findings (Occam's Razor)
 - Mining clinical data for demonstration of retained functional capacity
- Review specific tools and resources available to disability insurance companies to actively manage their claims and to assist the claimant in adapting their medical condition to their occupation.

15:15 – 15:30 **Refreshment Break**

15:30 – 16:45 **Concurrent Panel: The Business of Being a Contracting Insurance Medical Director**
Karen Blackstone, MD, DBIM
President, Blackstone Relative Risk, LLC, Shorewood, Minnesota
Karan Ciotti, JD
Attorney, Cokinos, Bosien & Young, Houston, Texas
Cliff Titcomb, MD
VP and Chief Medical Director, Hannover Life Reassurance Company of America, Denver, Colorado

Learning Objectives:

- Review the difference between an employee and an independent contractor:
 - Discuss the IRS's interest in the two categories
- Review the different types of corporations for a Contracting Medical Director:
 - Outline the advantages and disadvantages of each type
- Review how to determine the appropriate type of corporation:
 - Discuss "going it alone" w/o an entity
- Review independent contractor agreements:
 - Origin of agreement
 - Pitfalls to watch for
 - How to sign an agreement
 - Contracting directly with a corporation vs. via temp agency
- Explain the types of insurance required or recommended for an independent contracting Medical Director;
- Review the basics of running a business as an independent contractor:
 - Billing statements, tracking receipt of payment
 - Expense reimbursement statements
 - Creating fee schedules
- Mechanisms, pros and cons of marketing your services;
- Understanding the scope of the work:
 - Know when to say "no"
- Discuss contracting in general, including advantages, disadvantages and common mistakes made by independent contractors:
 - Define "piercing the corporate veil"
 - Discuss the risk of providing medical advice to a client company's employee.

15:30 – 16:45 **Concurrent: Hereditary Cancer Syndromes (Repeat)**
Loraine Oman-Ganes, MD, FRCPC, CCMG, FACMG
Chief Medical Director, Sun Life Financial, Toronto, Ontario

15:30 – 16:45 **Concurrent Panel: Disability Claims Discussion (Repeat)**
John Locasio, MD, ABIM, FACP, FAADEP
VP and Chief Medical Officer, United Health Care Financial Protection, Portland, Maine
Charlotte von Bodelschwingh, MD
Medical Consultant, Munich Re, Munich, Germany

07:45 – 08:00 **Greetings / Business**
Karen Blackstone, MD, DBIM
President, Blackstone Relative Risk, LLC, Shorewood, Minnesota

08:00 – 09:00 **Platform: Targeted Cancer Immunotherapy**
Rayne Rouce, MD, FAAP
Assistant Professor, Texas Children’s Hospital – Feigin Center, Houston, Texas

Learning Objectives:

- Outline the range of available immunotherapies including targeted and generalized treatments;
- Discuss the types of malignancies where targeted immunotherapies show current efficacy or future promise;
- Present survival statistics for targeted immunotherapies for selected hematological and non-hematological malignancies;
- Discuss CAR T-cell therapy and its current and future clinical utility.

09:10 – 10:10 **Platform: Update on Hepatitis C**
Hope Hubbard, MD
Assistant Professor of Medicine, University of Texas Health Science Center, San Antonio, Texas

Learning Objectives:

- Understand the pathophysiology of hepatitis C virus, associated hepatitis and extrahepatic manifestations;
- Understand the epidemiology of hepatitis C including incidence, prevalence, mode of infectivity, and mortality risk;
- Understand the current clinical guidelines in the evaluation, testing, and imaging of affected individuals including: Fibroscan testing;
- Understand the treatment options that are currently available and the effect on long term outcomes and mortality risk;
- Understand the effectiveness of current treatments and possible future trends.

10:10 – 10:30 **Refreshment Break**

10:30 – 11:30 **Platform: Blood Pressure Ratings vs. Actual Risk, A Growing Disparity?**
Michael Fulks, MD
Medical Consultant, Jackson, California

Learning Objectives:

- The distribution and mortality associated with BP in insurance applicants;
- The importance of systolic BP relative to diastolic in risk assessment;
- How pulse pressure can identify a small number of applicants with high risk;
- The relative risk associated with systolic BP vs. that for other preferred factors;
- The risk associated with a hypertension history if current measured BP is controlled;
- How alternatives to “140/90” would better define a healthy BP and improve risk assessment.

11:30 – 12:30 **Platform: Interstitial Lung Disease and Pulmonary Hypertension**
Rodney Richie, MD, DBIM
Medical Director, Texas Life Insurance Company, Waco, Texas

Learning Objectives:

- Review the Interstitial Lung Diseases and focus on the Idiopathic Interstitial Lung Diseases;
- Discuss the mortality implications of the presence of Interstitial Lung Disease in applicants for Life and Disability Insurance;
- Review the current diagnosis of Pulmonary Hypertension;
- Review the WHO Types of Pulmonary Hypertension, including mortality and morbidity statistics.

12:30 – 14:00 **Business Meeting / Lunch**

14:00 – 15:15 **Concurrent: Mortality Analysis Made Easier – Using Modern Tools to Streamline the Analysis of Survival Data**
Dr. Steve Rigatti, MD, DBIM
VP, MassMutual, Springfield, Massachusetts

Learning Objectives:

- To briefly review the basics of life table analysis including Mortality Ratios and Excess Death rates
- To introduce modern tools to make survival analysis broader and more efficient
- To orient the audience to public sources of survival data including SEER and NHANES
- To demonstrate the use of SEER*Stat for the construction of a cancer survival query
- To analyze survival data using Excel, R and R-studio
- To demonstrate specific skills such as pivot table construction, spreadsheet calculation and the use of formulae and cell references
- To discuss the proper use and interpretation of Cox models in survival analysis and to demonstrate Cox model construction

14:00 – 15:15 **Concurrent: Big Data's Role in Insurance Medicine**
Michael Clark, MD
Senior VP and Chief Medical Director, Swiss Re, New York, New York
Jason Bowman, ACII, DMU(AMS)
Head of Magnum North America, Strategy and Client Services, Swiss Re, New York, New York

Learning Objectives:

- Define Big Data in a way that is relevant to insurance in general, and insurance medicine in particular
- Review specific subsets of Big Data currently in use or being explored for insurance applications
- Review the current role of EBR and how that is disrupted and/or benefitted by Big Data
- Explore methods to evaluate the value of Big Data for insurance risk assessment
- Define the complementary role of automation in the acquisition and use of Big Data
- Outline briefly some of the regulatory aspects to Big Data acquisition and use
- Envision where insurance medicine and risk assessment will be in the short-term and long-term perspective

14:00 – 15:15 **Concurrent: Kidney Disease**
Georgiana Pascutiu, MD, DBIM
Medical Director, RGA International Corporation, Toronto, Ontario
Ankit Mehta, MD, FASN
Nephrologist, Dallas Nephrology Associates, Dallas, Texas

Learning Objectives:

- Briefly define microalbuminuria, proteinuria and hematuria;
- Briefly review the current definitions and staging for chronic kidney disease;
- Briefly review the differential diagnosis of microalbuminuria, proteinuria and hematuria;
- Define different modes of evaluating renal function;
- Compare and contrast manifestations, clinical course, lab test results and morbidity and mortality risk for commonly encountered glomerulopathies including IgA nephropathy, polycystic kidney disease.

15:15 – 15:30 **Refreshment Break**

Please see the next page for the 15:30 – 16:45 concurrent sessions

TUESDAY, SEPTEMBER 27, 2016 (continued)

- 15:30 – 16:45 **Concurrent: Mortality Analysis Made Easier – Using Modern Tools to Streamline the Analysis of Survival Data (Repeat)**
Dr. Steve Rigatti, MD, DBIM
VP, MassMutual, Springfield, Massachusetts
- 15:30 – 16:45 **Concurrent: Big Data's Role in Insurance Medicine (Repeat)**
Michael Clark, MD
Senior VP and Chief Medical Director, Swiss Re, New York, New York
Jason Bowman, ACII, DMU(AMS)
Head of Magnum North America, Strategy and Client Services, Swiss Re, New York, New York
- 15:30 – 16:45 **Concurrent: Kidney Disease (Repeat)**
Georgiana Pascutiu, MD, DBIM
Medical Director, RGA International Corporation, Toronto Ontario
Ankit Mehta, MD, FASN
Nephrologist, Dallas Nephrology Associates, Dallas, Texas

WEDNESDAY, SEPTEMBER 28, 2016

- 07:55 – 08:00 **Greetings / Business**
Karen Blackstone, MD, DBIM
President, Blackstone Relative Risk, LLC, Shorewood, Minnesota
- 08:00 – 09:00 **Platform: Updates in Rheumatology**
Stephen Derbes, MD
Rheumatologist, New Orleans, Louisiana
Learning Objectives: to be confirmed
- 09:00 – 10:00 **Platform: Update in HIV**
Melanie Thompson, MD
Principal Investigator
AIDS Research Consortium of Atlanta
Atlanta Georgia
Learning Objectives
 - Brief review of HIV viral replication and ART
 - Discuss morbidity and mortality risks facing HIV positive applicants who are adherent to therapy
 - Review challenges such as inadequate drug adherence, drug resistance and co-morbidities such as chronic hepatitis, cancer risks and cardiovascular disease
 - Describe current mortality data and any future expected mortality improvements
- 10:00 – 10:15 **Refreshment Break**
- 10:15 – 11:15 **Platform: Oncology – IPMN and Other Pancreatic Neoplasms**
Rachna Shroff, MD
Assistant Professor, Department of Gastrointestinal Medical Oncology, Division of Cancer Medicine
University of Texas MD Anderson Cancer Center, Houston, Texas
Learning Objectives:
 - List the four subtypes of pancreatic cystic neoplasms;
 - Discuss IPMN in more detail:
 - Epidemiology
 - Illustrate the abnormality using imaging studies
 - Evaluation and management
 - Malignancy risk – pancreatic and extra-pancreatic
 - Prognosis/mortality risk
 - Review pancreatic exocrine neoplasms:
 - Epidemiology/risk factors
 - Evaluation and management
 - Mortality risk

SOCIAL ACTIVITIES AND TOURS

Sunday, September 25

Austin Highlights City Tour

13:00 – 17:00

The Austin City Tour showcases the best and most interesting sites in the city. Guests will enjoy the commentary of the tour guide, a longtime Austinite who enjoys sharing Austin's unique qualities and stories with each visitor.

Your tour will take you on a 30 mile driving tour around the city as you experience highlights of Austin including the Austin City Limits Studio, Barton Springs, South Congress Avenue, the Bullock Texas State History Museum, Zilker Park, historic Congress Avenue, Congress Avenue Bridge and Bat Colony, LBJ Presidential Library, Sixth Street, Texas Capitol Building, Texas Governor's Mansion, Texas State Cemetery, University of Texas at Austin, UT Football Stadium and many more.



Enjoy a stop at the Texas State Capitol, widely recognized as one of the nation's most distinguished state capitols. This magnificent building and its rich history are truly awe inspiring. Experience Mount Bonnell, a not-to-be-missed site in Austin. Embark on a climb up the steps to one of the highest points within the city limits affording a fabulous view of the city, the sparkling river and surrounding rolling hills. It is well worth the exercise!

Take a walk through Texas history at the picturesque Texas State Cemetery. Established in 1851, this is the final resting place of Governors, Senators, Legislators. Congressmen, Judges and other legendary Texans.

Maximum: 28 people
Recommended Attire: Casual clothing, comfortable footwear
Price: \$40 USD (includes return transportation, guide)

Kayaking On Lady Bird Lake

13:30 – 17:30

Spend Sunday afternoon on the water touring picturesque Lady Bird Lake. You will experience some of Austin's most popular sites, hear some local history and fun facts, and learn all about the famous Congress Avenue Bridge bats that reside in Austin from March to October.

Maximum: 28 people
Recommended Attire: Casual clothing, comfortable footwear, sunscreen, hat
Price: \$90 USD (includes return transportation, kayak rental, guide)

Monday, September 26

Wimberley Art And Wine Tour

09:30 – 14:30

The Art of Texas takes many forms. Head out for a day in Texas Hill Country to experience Texas artist treasures and Texas wine at its finest!

Begin with a scenic drive to Wimberley, an artist mecca only a short drive from Austin. One of the favorite artisan shops near this quaint village is Silo Glass Studio and Gallery. A visit to the gallery is a unique and entertaining experience. Marvel at the beautiful craftsmanship of glassblowing during a tour and demonstration. Spend some time browsing the gallery for your very own piece of hand blown art glass. Artists use a variety of materials to create the brilliantly colored designs on display. A short drive away you will enjoy a wine tasting at Driftwood Vineyards, followed by lunch at Linda's Fine Foods.



Maximum: 22 people
Recommended Attire: Casual clothing, comfortable footwear
Price: \$125 USD (includes return transportation, tours and lunch)

Monday, September 26 (continued)

Austin Hybrid Food Tour

18:00 – 21:00

Explore the range of culinary opportunities Austin has to offer with this exciting tour for foodies. The tour includes four savory stops and one dessert stop. Experience one of Austin's fine dining restaurants, one Texas Barbecue stop, two of Austin's top Food Trucks and dessert.

Maximum: 50 people
Recommended Attire: Casual
Price: \$120 USD (includes return transportation, all food and two drinks (wine, beer, cocktails))

Tuesday, September 27

Lady Bird Johnson Wildflower Center Tour

09:30 – 14:30

The Lady Bird Johnson Wildflower Center is dedicated to preserving the natural beauty of Texas. This 279-acre center features gardens of local plant life and native animals, including turtles and butterflies. This spectacular garden features caves, woodlands & meadows containing 7,200+ rare and endangered local plant species. Enjoy a leisurely lunch at the picnic food truck park as part of your relaxing day.

Maximum: 22 people
Recommended Attire: Casual clothing, comfortable footwear
Price: \$105 USD (includes return transportation, entrance fee, guide and lunch)

Social activity descriptions are valid as of June 10, 2016 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, Tuesday and Wednesday (September 26, 27 and 28)

Express Yoga

06:30 – 07:15

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. Weather permitting the yoga class will take place on the roof of the Westin Austin Downtown Hotel.

Maximum: 15 people
Recommended attire: loose, comfortable clothing
Price: no charge (includes instructor, yoga mats, bottled water)

EVENING PROGRAM

* 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 25

Welcome Reception

18:00 – 20:30

Begin the meeting with an evening of socializing with your colleagues in the lobby and lounge area of Stella San Jac, the Westin Downtown's Southern-inspired restaurant. Located off the main lobby the art deco surroundings is the ideal setting to re-connect with friends and make new acquaintances. Sample a variety of specialities while listening to some local music that make Austin the special city that it is.



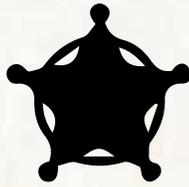
Tuesday, September 27

Farewell Dinner

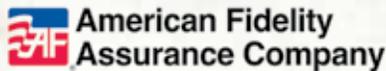
18:30 – 22:00

What better way to celebrate our last evening in Austin than with a traditional BBQ dinner. Put on your Western duds and join your colleagues and friends for a relaxing evening featuring Austin's own Deep Eddy Vodka and Salt Lick BBQ. In addition to live music, you will be able to cheer on the Armadillo races while sampling some of Austin's finest food trucks.





Thank you to our sponsors
who have confirmed to date:



For more information, contact the AAIM Executive Secretary:

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