

# NEWSLETTER

Bruce A. Monaghan, MD, Editor

Summer 2021



52nd Annual Meeting 🎵 October 20-23, 2021 🎵 Omni Nashville Hotel 🎵 Nashville, TN



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## Eastern Orthopaedic Association

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Atlanta, GA



## PRESIDENT'S MESSAGE

### Marc J. Levine, MD



Dear Colleagues, Friends and Family,

As we finally find light from the shadows of COVID-19, the Eastern Orthopaedic Association has emerged more energized than ever to embark on our "Next 50 Years." Our 2021 Annual Meeting has been carefully crafted to welcome and re-engage all of our members, colleagues, families and special guests in-person in Nashville, Tennessee.

Nashville provides the ideal upbeat setting, full of music, food and unforgettable activities to once again bring us all together. Our Social Committee, along with my wife, Robin is putting the final touches on an extensive itinerary with exciting opportunities for all, including a visit to the Grand Ole Opry.

Program Chair Joshua Baumfeld, MD has designed a scientific program that will exceed your expectations. The EOA has received over 1,000 abstract submissions, currently being reviewed by the Program Committee. Scientific symposiums will be led by nationally-recognized experts, and a special thanks to Vanderbilt University's Department of Orthopedic Surgery who, in the way of true southern hospitality, has offered several faculty members to participate. As always, Rapid Fire sessions as well as a Resident OITE Review Course will be highlights of our meeting. In addition, the New Jersey Orthopaedic Society will host a symposium including fascinating talks from former NFL players. The EOA along with the EOEF remain committed to providing an exceptional program with numerous travel grants for orthopaedic residents and fellows.

Congressman Mark Green, MD of the 7th district of Tennessee has accepted my invitation to deliver the 2021 Howard Steel Lecture. Congressman Green's accomplishments are too numerous to mention here - in addition to graduating from West Point and achieving the rank of Major, Congressman Green was awarded the Bronze Star and the Air Medal with V Device for Valor, among others. As a physician, Dr. Green founded an emergency room department staffing company that grew to over \$200 million in annual revenue.

I could not be more proud to have Scott Boden, MD deliver the EOEF Presidential Guest Speaker Lecture. Dr. Boden's career exemplifies that of clinician, researcher and educator. As the current Chairman of the Department of Orthopaedics at Emory University School of Medicine, Dr. Boden is expertly navigating the ever-changing dynamics of healthcare delivery.

In addition, we will be presenting the first-ever Eastern Orthopaedic Association Outstanding Service Awards, our first deserving recipients being Robert Boran, MD and Betty Jo Steel.

This year's Eastern Orthopaedic Association Annual Meeting will be an ideal opportunity to reconnect with old friends and colleagues while also making new ones. So, please mark your calendar to join our EOA family for an exceptional scientific and social line-up that will appeal to clinicians and their families, alike.

Respectfully,

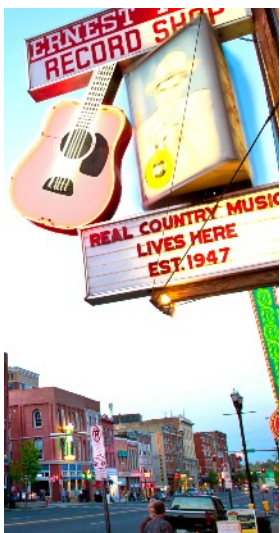
*Marc Levine*

Marc J. Levine, MD  
President of Eastern Orthopaedic Association

### The EOA Mission

The purpose of the EOA shall be to promote, encourage, foster and advance the art of science and orthopaedic surgery and matters related thereto, and to establish a forum for free discussion and teaching of orthopaedic methods and principles among the members.

## COME JOIN THE FUN



The Eastern Orthopaedic Association's Annual Meeting is October 20-23, 2021, at the Omni Nashville Hotel in Nashville, Tennessee. The Omni Nashville Hotel is located in all the excitement of downtown Nashville, just a short walk away from the nearby Ryman Auditorium and Music City Center. The design is a modern expression of the city's distinct character, incorporating natural materials, exposed steel and regional limestone. The multi-story hotel and expanded museum share meeting and entertainment space that brings additional restaurants and retail venues to this impressive destination.

Nashville known as "Music City" is the capital of Tennessee and located on the Cumberland River. It is a major center for

the music industry, especially country music. The downtown area features a diverse assortment of entertainment venues, night clubs, restaurants, cultural and architectural attractions for all to enjoy. It is also home to numerous colleges and universities.

Tours and activities being planned for all to enjoy at the meeting include Andrew Jackson's Home and a Nash Trash Tour. The meeting will kick off with a Welcome Dinner at the Wildhorse Saloon® and end with the always enjoyable EOA Jazz Band Reception and Dinner & Diamonds themed Founders' Dinner. As usual there will be a spouses/guest hospitality area, daily gentle yoga/meditation, golf and a book discussion. There will also be a children's party Friday and Saturday nights, so parents can participate in the evening meeting events.

The complete meeting information along with tour/activities material and prices will be in the EOA Preliminary Program. The Preliminary Program will be mailed in the Summer as well as posted on the EOA website at [www.eoa-assn.org](http://www.eoa-assn.org).

### Thursday, October 21

#### Spouse/Guest Hospitality with Nashville's Hottest Songwriter

Enjoy a continental breakfast with old friends and new, with a special presentation from a songwriter that has written hits for many of Nashville's stars.



#### Andrew Jackson's Home

Visit The Hermitage in Nashville, Tennessee. Walk through Andrew Jackson's life and home, explore a beautiful, historic Tennessee farm and experience an important piece of Nashville and our nation. Enjoy a guided, walking VIP tour through the grounds and mansion plus special access to the mansion balcony. The tour also includes a wine tasting at the onsite tasting room, Natchez Hills Winery at Andrew Jackson's Hermitage (for guests ages 21+).



#### Welcome Dinner at Wildhorse Saloon®

The World-Famous Wildhorse Saloon® is a unique venue known for world class live entertainment, a menu featuring southern smokehouse cuisine with signature fried pickles, line dancing, live entertainment and true southern hospitality.

### Friday, October 22

#### Spouse/Guest Continental Breakfast & GOO GOOs!

Enjoy a continental breakfast at the Goo Goo Shop! You'll explore the rich history of Nashville's official candy bar, taste your way through a

sample of classic clusters, flex your chocolatier skills while making your own Goo Goo, and savor the experience with a flight of rich drinking chocolates. Enjoy 15% off any in-store purchase on that day!

#### Nash Trash Tours

The tour travels through downtown Nashville. There's lots of audience participation and improv comedy, which means there's as much going on inside the bus as outside...you'll laugh 'til your face hurts! It's a rowdy, very risqué, one-of-a-kind musical-comedy extravaganza.



#### Golf Tournament at The Hermitage

Having been voted the "Best Golf Course in Nashville," General's Retreat is a "must play" when visiting the Nashville area. With the beautiful setting along the Cumberland River and a variety of tee placements, golfers of all capabilities will thoroughly enjoy the golf, scenery and hospitality offered at the Hermitage Golf Course. The tournament will be a 1:20 pm shotgun start with scramble format.

#### Green Brier Distillery

Enjoy a tour highlighting the unique history and the revival of the Nelson's Green Brier brand and distillery, visit the production floor, and sample tastings. They specialize in craft whiskey production with an emphasis on Tennessee Whiskey. Must be 21 years and older.

### Saturday, October 23

#### Spouse/Guest Hospitality with Book Discussion

*Little Fires Everywhere* by Celeste Ng

#### Jazz Reception/Founders Dinner Dance

You're in for an exciting night in Denim & Diamonds, beginning with music from none other than our own EOA Jazz Band. Then let your hair down and have some fun with your friends and colleagues. There will be a fabulous band, dinner and drinks, and don't forget to bring your dance moves!

## PRESIDENTIAL GUEST SPEAKER

### Scott D. Boden, MD

The EOA is pleased to have Scott D. Boden as the 2021 Presidential Guest Speaker. Dr. Boden is an orthopedic surgeon with more than 25 years of experience specializing in spine surgery. He is Director of the Emory Orthopaedics & Spine Center and Chairman of the Department of Orthopaedics at Emory University School of Medicine.

Dr. Boden is a researcher on such topics as spinal fusion and clinical outcomes relating to spinal disorders. He has taught courses on back and neck pain treatment and frequently lectures on orthopedic spine research. He has authored hundreds of scientific articles published in peer-reviewed medical journals and is the co-author of numerous books, including *Operative Techniques* and *Spine Surgery and Low Back and Neck Pain*.

Dr. Boden is an EOA Past President and the current Managing Director. He has also served as President of the American Orthopaedic Association and International Society for Study of the Lumbar Spine. Throughout his career, Dr. Boden has served on various committees within the American Academy of Orthopaedic Surgeons, the Orthopaedic Research Society, and the North American Spine Society. He has also served on the Editorial Boards of the *Journal of the American Academy of Orthopaedic Surgeons*, *Spine*, *Contemporary Spine Surgery*, and *Spine Surgery Today*.



## EOEF HOWARD STEEL LECTURER

### Congressman Mark Green

The EOA is pleased to welcome Congressman Mark Green of Tennessee as the 2021 EOEF Howard Steel Lecturer. Congressman Mark Green took the oath of office to represent the 7th district of Tennessee on January 3, 2019 (the same oath he first took as a cadet on the historic Plain at West Point over 30 years before). A business leader, decorated combat veteran and ER physician, Green served in the Tennessee State Senate before his election to Congress.

Throughout his career, Congressman Green's love for America's founding principles has inspired his service. His life experiences make him ideally suited to serve Tennesseans, and his experience building a successful healthcare company equips him to take on wasteful spending and over-regulation. His 24 years of Army service have impressed upon him the need for strong American leadership internationally, a globally responsive military and a well cared-for military family.

Congressman Green brings the unique perspective of doctor, healthcare administrator and cancer survivor to addressing the issues surrounding healthcare in America. His legislative experience in Tennessee readies him to fight for all of our rights and liberties.

The son of a hardworking father and loving mother, Congressman Green grew up on a dirt road in Mississippi. He came to Tennessee in his last Army assignment as flight surgeon for the premier special operations aviation regiment. As a Night Stalker, he was deployed to both Iraq and Afghanistan during the War on Terror – his most

memorable mission being the capture of Saddam Hussein (detailed in his book, *A Night with Saddam*). He was awarded the Bronze Star and the Air Medal with V Device for Valor, among others.

After his service in the Army, Congressman Green founded an emergency department staffing company that grew to over \$200 million in annual revenue, providing staffing to 52 hospitals across 11 states. He also founded two free medical clinics, providing healthcare to under-served populations in Memphis and Clarksville, and embarked on numerous medical mission trips across the world.

He was elected to the Tennessee State Senate in 2012, where he distinguished himself as a conservative leader. His many legislative accomplishments include the repeal of the Hall Income Tax (only the second state-repealed income tax in US history) and the passage of the Tennessee Teacher Bill of Rights. His numerous awards include the National Federation of Independent Business' Guardian of Small Business award and Latinos for Tennessee's Legislator of the Year.

Congressman Green resides in Clarksville, Tennessee with his wife, Camilla. They have two grown children.

## Connect With Us On Social Media



In an effort to stay connected and up to date with EOA, please follow us on Twitter @EOAOrtho on Instagram @EasternOrthopaedicAssoc and on Facebook @EasternOrthopaedicAssn

## HAVE A STORY TO INCLUDE IN THE NEWSLETTER?

Please send it to Heather Skinner at [hskinner@datatrace.com](mailto:hskinner@datatrace.com).



# Past Meeting Memories





## LONG-TERM CARE PLANNING: EARLY IMPLEMENTATION CAN REDUCE FAMILY STRESS WHILE IMPROVING WEALTH PROTECTION

By David B. Mandell, JD, MBA & Jason M. O'Dell, MS, CWM

What comes to mind when you consider the phrase “Long-Term Care”? You may think of the services provided by a nursing home, assisted living facility or in-home caregiver. In fact, long-term care can be any one or a combination of these services needed for yourself, your spouse, your parents or in-laws.

One might think that physicians anticipate the medical, family and financial challenges of long-term care and make proper planning decisions before the need for care creates a tension-filled issue. Unfortunately, this is often not the case. In this article, we will describe the background of long-term care planning and give an overview of some key issues all physicians should understand.

### The Challenge

As physicians, orthopaedic surgeons should be aware of the medical reasons people need long-term care services. Very simply, as we age, basic daily functions (called Activities of Daily Living or ADLs in long-term care jargon) become difficult to perform without assistance. ADLs include Eating, Bathing, Dressing, Toileting, Transferring, and Continence.

All physicians should also be aware that assistance with such activities, whether in a nursing home, in a skilled nursing facility or even at home, can be very expensive – and the need for assistance may last for years. In fact, the yearly cost for full nursing home care can be \$100,000 or more. Thus, for both family and financial reasons, giving careful thought to these challenges in advance of a long-term care need is wise.

Looking at the macro statistics<sup>1</sup>, just a few numbers can tell the story:

1. 15 million: The number of Americans expected to have a high long-term care need by 2050.
2. 52.3%: The expected percentage of people turning 65 who will have a long-term care need during their lifetimes.
3. \$225 billion: Long-term care expenditures in U.S., 2015.

4. \$470 billion: The dollar value of long-term care provided by unpaid caregivers, 2013.
5. 129,000: Number of individual long-term care insurance policies sold, 2014.
6. 305,068: Number of hybrid life/long-term care policies sold to individuals, 2013.

Generally, the government will pay for long-term care as part of the Medicaid program, but only after the care recipient meets certain state-specific income, asset and physical minimums. Said differently, you must be poor by state standards before the government will assist you under the Medicaid program, and the assistance will likely be provided in a nursing home. For most orthopaedic surgeons and their spouses, meeting these minimums would mean losing most of the assets they have worked hard to earn over their careers – an unacceptable proposition. However, for the parents and in-laws of some physicians, Medicaid qualification may be a suitable solution. With advance planning, the use of Medicaid trusts and other tools to qualify for benefits by moving assets to family members can be a viable option that should be explored.

### Having family members provide care

While siblings, children, grandchildren and farther-removed family members can play an important role in providing care, there are a myriad of issues to consider, including time management, geography and funding. Think about how pressed for time most people are today, balancing the demands of their families and careers. Ponder also the challenges that could arise if some family members live near the person needing care and others do not. Will all geographically close relatives split duties equally? Will some be compensated for their time? At what rate? Can family members do a good job of providing care – or even an adequate one? Even in the best of circumstances, these are issues that can build resentment, anger and stress, and can often lead to serious repercussions throughout the family.

### Paying out of pocket

Certainly, many orthopaedic surgeons can afford to pay out of pocket for months if not years of

services for themselves and their spouses. But, is this a wise choice from an overall financial planning perspective? It may not be, especially when insurance coverage is considered (see below).

Even more problematic may be paying out of pocket for parents or in-laws, especially when other siblings do not have the ability or desire to pay their “fair share.” Anger, stress and resentment among family members are common in these situations.

### Insurance Coverage

Purchasing insurance to cover long-term care needs can be a sound part of a financial plan. Long-term care (LTC) insurance is an insurance product which pays for long-term care services in many settings, such as at home, in a nursing home, assisted living facility, or adult day care facility. Since there are many different LTC insurance plans and insurance carriers who offer them, it is important to make sure the plan you select will meet your foreseeable needs. Some plans cover facilities-only care, while others cover facilities care and home care. Some policies exist as stand-alone LTC policies and others can be hybrid life insurance/LTC policies.

When deciding on the best choice for you or a family member, it is essential to work with an experienced insurance advisor who is familiar with the products in the marketplace. Also, as with most insurance, costs typically increase with the age of the insured, so there can be a significant benefit in locking down favorable coverage sooner rather than later.

### Conclusion

Because long-term care planning will impact nearly every family in some way, it is wise to proactively examine options for you and family members before the need for care arises. Timely implementation of long-term care planning strategies can have a positive effect on family dynamics, while helping to protect the wealth a physician has worked hard to earn.

<sup>1</sup> <https://www.morningstar.com/articles/823957/75-mustknow-statistics-about-longterm-care.html>

continued on p. 7

## Welcome NEW MEMBERS

David Benatar, MD, Syosset, NY  
 Gregory C. Berlet, MD, Worthington, OH  
 Patrick E. Bull, DO, Worthington, OH  
 William Charlton, MD, Kingston  
 Michelle M. Coleman, MD, PhD, Atlanta, GA  
 Arturo Corces, MD, Miami, FL  
 Michael Dechan, MD, Hackettstown, NJ  
 Michael Duch, MD, Hamilton, NJ  
 Matthew Eichenbaum, MD, Wilmington, DE  
 David R. Gentile, MD, FACS, Tinton Falls, NJ  
 Kevin Gingrich, MD, Thomaston, GA  
 Carolyn M. Hettrich, MD, Boston, MA  
 Taylor A. Horst, MD, Woburn, MA

Christopher F. Hyer, DPM, Worthington, OH  
 Gregory Klingenstein, MD, Medford, NJ  
 Sanjit Konda, MD, New York, NY  
 Vadim Lerman, DO, Massapequa, NY  
 John W. Murphy, MD, Hackettstown, NJ  
 Terrence M. Philbin, DO, Worthington, OH  
 Danielle Ponzio, MD, Egg Harbor Twp, NJ  
 Mark A. Prissel, DPM, Worthington, OH  
 James Sanfilippo, MD, Moorestown, NJ  
 Daniel Scott, MD, MBA, Charleston, SC  
 Scott A. Sigman, MD, North Chelmsford, MA  
 Amanda Spraggs-Hughes, PhD, Hartford, CT  
 Glen P. Wainen, MD, Hackettstown, NJ

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 EOA and Arthrex have partnered  
 to bring you FREE access to

Surgical Outcomes System™

Visit [www.eoa-assn.org/membership](http://www.eoa-assn.org/membership) for more information.

## Future Meetings



52nd Annual Meeting  
 October 20-23, 2021  
 Omni Nashville Hotel  
 Nashville, TN



53rd Annual Meeting  
 October 26-29, 2022  
 The Ritz-Carlton Naples  
 Naples, FL

## LONG-TERM CARE PLANNING continued

**SPECIAL OFFERS:** To receive free print copies or ebook downloads of Wealth Planning for the Modern Physician and Wealth Protection Planning for Orthopaedic Surgeons, text ORTHONEWS to 844-418-1212, or visit [www.ojmbookstore.com](http://www.ojmbookstore.com) and enter promotional code ORTHONEWS at checkout.

David B. Mandell, JD, MBA, is an attorney, consultant and author of more than a dozen books for doctors, including Wealth Planning for the Modern Physician. He is a partner in the wealth management firm OJM Group ([www.ojmgroupp.com](http://www.ojmgroupp.com)), where Jason M. O'Dell, MS, CWM is also a partner and financial consultant. They can be reached at 877-656-4362 or [mandell@ojmgroupp.com](mailto:mandell@ojmgroupp.com).

### Disclosure:

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Eastern Orthopaedic Association  
110 West Road, Suite 227  
Towson, MD 21204

# *Save the Date*

52nd Annual Meeting  
October 20-23, 2021  
Nashville, TN

