

2020 CMT FORUM AGENDA
Theme: "DO FOR ONE ..."

DAY 1 FRIDAY, NOVEMBER 13, 2020

8:00-8:40 Registration, Check-In, Continental Breakfast and Networking w/ Exhibitors

8:45 -9:00 **Welcome and Opening Remarks**
 Host, **Michael Tetreault, Editor-in-Chief, Concierge Medicine Today**

General Session Ballroom/Exhibit Hall

9:00 – 9:45 **KEYNOTE**
Evolve Your Culture, Evolve Your Practice: Increase Your Capacity to Adapt
 Dr. **Laura Gallaher, Gallaher Edge**

9:45 – 10:00 Break/Cleaning/Networking With Exhibitors

10:00 – 10:45 **BREAKOUTS**

Breakout Room A
Financial Planning & Practice Valuation: Best Practices for the Concierge Physician –
 Chris Staples, CFP, Wealth360

Breakout Room B
Effective Retirement, Legacy Holder & Succession Planning Strategies –
 Craig Fowler, CEO, Athenic Group

General Session Ballroom
Marketing and Patient Referrals: The Pathways to Patient Loyalty
 Julie Robinson and Dr. Suzanne Turner

10:45– 11:00 Break/Cleaning/Networking With Exhibitors

11:00– 11:45 **BREAKOUTS**

Breakout Room A
Authentically Connecting through Tele-Medicine: How to have authentic connections with patients when meeting virtually (making sure patients feel seen, heard, and cared about).
 Dr. Rebecca Osei, CEO, Concierge Psychology

General Session Ballroom
Physician Wellbeing and Avoiding Career Burnout Strategies –
 Dr. Dean McElwain, Co-Founder, Castle Connolly Private Health Partners

11:45 – 12:00 Break/Cleaning/Networking With Exhibitors

12:00 – 12:30 **GENERAL SESSION**

Three Essentials For Those Doctors Who Will Shape Our Future:
 The World Has Changed but your mission remains the same. Patients want certainty, but sometimes that's not possible. When certainty is not an option, you can still offer them the next best thing. Your Leadership and influence in our future is temporary. However great or small, use the influence you have. When Doctors view their role as something for which has an end, we will be far less likely to leverage it for ourselves and waste opportunities.
 Dan Hecht, Former CEO, MDVIP; Former Leader/Executive, PROCTER & GAMBLE (NYSE:PG); Speaker, CEOhm

12:30– 1:15 **LUNCH and NETWORKING with EXHIBITORS**
 12:30-12:45
 (Lunch Sponsor Presentation 10-Minutes)



SPECIAL THANKS to our LUNCH SPONSOR
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1:15 – 2:00 **GENERAL SESSION**

Real-Time Medical Intelligence: How New Systems of Integrated Medical Intelligence Can Create All-knowing Superdoctors
 Medical technology now allows for cancer to be detected in a patient's blood through cell-free DNA (cfDNA). When a disease is developing in the body, the affected cells die and shed into the bloodstream. Life-threatening diseases like cancer leave a unique combination of mutations in the DNA of these dead cells. By investigating every single copy of cell-free DNA in a blood sample, we can gain a uniquely deep and comprehensive insight into the body's current health status. Jo Bhakdi, CEO of Quantgene will discuss their method for Deep Human Genome sequencing which allows Doctors to see mutational patterns of disease down to a single molecule. This means diseases like cancer can be detected far earlier than ever before.
 Jo Bhakdi, CEO, Quantgene

2:00 – 2:15 Break/Cleaning/Networking With Exhibitors

2:15 – 3:00 **BREAKOUTS**

Breakout Room A
Peptide Therapy: Advancing the clinical use of peptides & understanding regenerative properties ranging from reducing inflammation, improving skin quality to improving the immune system.
 Dr. Suzanne Turner, MD, Founder, Vine Medical

Breakout Room B
IV Nutrition Programs & the Growing Trend of IV Drip Bars: Adding IV Hydration & Nutrition to Your Clinic
 Emily Durham, MS, CPhT, Director of Business Development, Integrity Compounding Pharmacy

General Session Ballroom
The Concierge Doctor's Circle of Life: From Exploration to Exit
 Terry Bauer, CEO, Specialdocs Consultants

3:00 – 3:15 Break/Cleaning/Networking With Exhibitors

3:15 – 3:45 **GENERAL SESSION**

Restoring the Balance: A Physician's Guide to the New World Ahead of Us
 Dr. Uday Jani

3:45 – 4:00 Break/Cleaning/Networking With Exhibitors

4:00 – 4:45 **GENERAL SESSION**

"There's Nothing a Little Innovation Can't Solve" – Pilot Experience with Audiovisual Reports of Radiological Studies. Audiovisual patient education can help overcome poor health literacy in patients and allow patients to more easily understand their medical problems so that they can participate in making medical decisions more effectively. We report our pilot experience providing audiovisual reports of radiology studies directly to patients.
 Dr. Joshua Polster, Vice Chairman, Imaging Office of Innovations at Cleveland Clinic; Physician/Radiologist & Imaging Institute, Cleveland Clinic

4:45 – 5:00 Break/Cleaning/Networking With Exhibitors

5:00 – 6:00 **GENERAL SESSION**

Physician Panel | Social Media Made Simple: How Doctor's Are Building A Digital Community on Social Media – From Education to Advocacy With Three Doctors Making A 'Dent' In Their Social Media Universe
 Most Physician's forget the "social" in social media. Oftentimes, a Doctor's default setting on social media is to be a megaphone about topics or their practice/brand rather than engaging in a conversation with their community and Patients. In this lively and energizing, insightful and interactive Physician Panel Discussion, you'll hear from three successful Doctor's as they share their secrets to their success on different social media platforms.
 They'll share their own personal posts, stories and photos with you as well. You'll learn exactly how they use social media to show/tell us all why we should be more concerned about becoming "fans" of our Patients instead of trying to convince Patients to become followers of the Doctor and Practice.
 The secret is in these three steps, **Listen, Talk, Celebrate!**
 Michael Tetreault (Moderator); Dr. Uday Jani, and Dr. Laura and Mark Beaty, MD

6:00 – 6:15 Closing Remarks

6:15 – 7:00 Evening Cocktail Reception – TBD |
 Dependent Upon Sponsor Participation & Social/State Guidelines

DAY 2 SATURDAY, NOVEMBER 14, 2020

8:00-8:30 Networking Breakfast

8:35 – 9:45 **GENERAL SESSION**
Current Legal Landscape and Compliance
 Jim Eischen, Esq., Eischen Law Offices; Founder/Instructor, Lofty Learning

9:45 – 10:15 Break/Cleaning/Networking With Exhibitors

10:15 – 11:15 **GENERAL SESSION**
TeleHealth in the Concierge Practice – Application and Legal Considerations
 Michelle Madison, Esq.

11:15 – 11:30 Break/Cleaning/Networking With Exhibitors

11:30 – 12:00 **GENERAL SESSION**

Creating A Patient Gratitude & Patient Appreciation System:
 The Pathway to Patient Loyalty Is Referrals. But Referrals Need Measurable, Memorable and Remarkable Touch Points That Create an Emotional Bond with the Physician.
 Michael Tetreault, Editor-in-Chief, Concierge Medicine Today

12:00 – 12:15 Closing Remarks and Launch
 Catherine Sykes, Founder, Concierge Medicine Today

