



# 2023 Fall Meeting

October 4-6, 2023, Cleveland, OH

**SPECIALIZING IN THE ART & SCIENCE OF  
UNDERWRITING**



**J.L. Thomas & Company, Inc.**

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## WELCOME!

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A warm and hearty welcome to Cleveland, Ohio, home of world-class health care institutions, and the Rock 'n' Roll Capital of the World!

On behalf of the Risk Appraisal Forum, thank you for taking the time to be a part of this amazing event. Over the next few days, as you engage in enlightening discussions, share your expertise, and network with peers, I hope you'll not only gain valuable insights from our meeting, but also discover the warm hospitality that defines our city.

Thank you once again for your commitment to RAF and the opportunity to host this wonderful meeting.

*Kurt M. Thomas*

**Kurt M. Thomas, CFP®, CLU®, MSFS®**  
J.L. Thomas & Co., Inc.



# Schedule

## Wednesday, October 4<sup>th</sup>

10:00 am – 2:00 pm: **Golf (for those who registered)**  
Location: Avon Oaks Country Club

5:00 pm – 6:00 pm: **Business Meeting – RAF Members Only**  
Location: Platinum, 7<sup>th</sup> Floor

6:00 pm – 9:00 pm: **Welcome Reception**  
Location: Highball Cleveland Lounge

## Thursday, October 5<sup>th</sup>

8:00 am – 9:00 am: **Breakfast**  
Location: Ballroom B, 6<sup>th</sup> Floor

9:00 am – 10:00 am: **Items That Are Often Postponed, That Offers Could Be Made On**  
Regina Rosace, M.D., FAAP, DBIM  
SCOR Global Life Americas  
Location: Ballroom A, 6<sup>th</sup> Floor



10:00 am – 11:00 am: **Success with Drug Resistant Epilepsy**  
Lara Jehi, M.D.  
Cleveland Clinic  
Location: Ballroom A, 6<sup>th</sup> Floor

11:00 am – 11:15 am: **Break**

11:15 am – 12:00 pm: **RAF Roundtable**  
Location: Ballroom A, 6<sup>th</sup> Floor

12:00 pm – 1:15 pm: **Lunch**  
Location: Ballroom B, 6<sup>th</sup> Floor

1:30 pm – 2:30 pm: **Psychedelics – A Reemerging Treatment for Behavioral Health Conditions**  
Brian Barnett, M.D.  
Cleveland Clinic  
Location: Ballroom A, 6<sup>th</sup> Floor

2:30 pm – 2:45 pm: **Break**



2:45 pm – 3:45 pm:

**Long QT Syndrome: The Model  
of Thriving with Inherited  
Arrhythmia**

Peter Aziz, M.D.

Cleveland Clinic

Location: Ballroom A, 6<sup>th</sup> Floor

3:45 pm – 4:30 pm:

**Business Meeting: RAF Members  
Only**

Location: Ballroom A, 6<sup>th</sup> Floor

6:00 pm – 9:00 pm:

**Dinner**

Location: Cleveland Chop

0.3 mile walk



# Friday, October 6<sup>th</sup>

8:00 am – 9:00 am:

## **Breakfast**

Location: Ballroom B, 6<sup>th</sup> Floor

9:00 am – 10:00 am:

## **Updates in the Landscape of Colon Cancer**

Bassam Estfan, M.D.

Cleveland Clinic

Location: Ballroom A, 6<sup>th</sup> Floor

10:00 am – 11:00 am:

## **MIB Myths and Updates**

Patti Dewitt, Vice President Member Services, MIB Group

Location: Ballroom A, 6<sup>th</sup> Floor

11:00 am

## **Meeting Adjourns Safe Travels!**



## GUESTS

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## SPEAKERS



### **Dr. Regina Rosace**

**Scor**

rrosace@scor.com

Dr. Rosace has been in her current position with SCOR since 2016, after having served four years as medical director for a small fraternal life insurance company. She graduated from Northeast Ohio Medical University and completed a

residency in pediatrics at a combined program in Phoenix, Arizona at both Maricopa Medical Center and Phoenix Children's Hospital. She is board certified in both Pediatrics (FAAP) and Insurance Medicine (DBIM).

Dr. Rosace practiced medicine for 27 years, predominantly in the Rainbow Babies and Children's Hospital Emergency Department in Cleveland, Ohio, where she is also an Assistant Professor of Pediatrics at Case Western Reserve University. She is a member of the American Academy of Insurance Medicine, is currently Chair of AAIM's Professional and Public Relations Committee as well as having served on three programming committees in the past several years. She is immediate Past-President of the Midwestern Medical Directors Association.



### **Dr. Lara Jehi**

**Cleveland Clinic**

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Dr. Jehi is professor of neurology at Cleveland Clinic Lerner College of Medicine, and an epilepsy specialist at Cleveland Clinic since 2006. She is Director of the Outcomes Research program for epilepsy, the Chief Research Information Officer for the Cleveland Clinic Health System, and the Executive Program lead for the Discovery Accelerator focused on artificial intelligence, quantum computing, and data science education.

She is currently spearheading multi-institutional National Institutes of Health-funded grants focused on data science. She has led teams that developed the first nomograms for individualized outcome prediction after epilepsy surgery, and advanced mechanistic understanding of outcomes. Her work



was featured by Lancet Neurology in the Top 5 Innovations of 2015, and in the 'Notables in Healthcare' Award by Crain's Business in 2021. Her data-driven algorithms for clinical care decision-making are being used, studied and expanded worldwide. Dr. Jehi holds several research leadership roles at Cleveland Clinic. As co-director of Network Capacity for the Clinical and Translational Science Collaborative of Cleveland, her team facilitates multi-center clinical trials through streamlined recruitment efforts, using the electronic health record. She is the principal investigator of Cleveland Clinic's Biorepository, a role leveraging information technology, enterprise analytics and regulatory support to efficiently scale up and incorporate biobanking efforts within clinical workflow. She is a vice-chair of Cleveland Clinic's Institutional Review Board.

She chairs several key commissions in the International League Against Epilepsy and the American Epilepsy Society. She has more than 170 peer-reviewed publications, 12 book chapters and is a regular reviewer for NIH study sections, and an invited speaker to international meetings on the topics of epilepsy surgery, outcome prediction, and data science.

Dr. Jehi received her medical degree from American University of Beirut. She completed her residency in neurology and fellowship in clinical neurophysiology at Cleveland Clinic, and holds a Master's degree in Health Care Delivery Science from Dartmouth College.



## **Dr. Brian Barnett**

**Cleveland Clinic**

barnetb3@ccf.org

Brian Barnett, MD is an Assistant Professor of Psychiatry at Cleveland Clinic Lerner College of Medicine and Co-Director of the Treatment-Resistant Depression Clinic at Cleveland Clinic. Dr. Barnett completed his psychiatry residency at Massachusetts General Hospital and McLean Hospital in 2017. Afterwards, he completed his fellowship in addiction psychiatry at Partners Healthcare in 2018 and a fellowship in forensic psychiatry at University Hospitals/Case Western Reserve University in 2019. Dr. Barnett's primary research interests are in catatonia, mood disorders, psychedelics, and psychedelic-assisted therapy. He is the primary investigator on a clinical trial assessing the efficacy of LSD for generalized anxiety disorder and a soon-to-launch clinical trial of psilocybin-assisted therapy for treatment-resistant depression.





## **Dr. Peter Aziz**

**Cleveland Clinic**

**azizp@ccf.org**

Dr. Aziz completed his pediatric cardiology fellowship at the Children's Hospital of Philadelphia in 2010 and continued his training there in pediatric electrophysiology. During his fellowship, Dr. Aziz was awarded a training grant under the National Institute of Health (NIH) to investigate genotype and phenotype correlations in pediatric patients with long QT syndrome. Dr. Aziz also acquired skills in catheter ablation of pediatric arrhythmias and device (pacemaker and ICD) implantation.

Following his fellowship, Dr. Aziz joined the Cleveland Clinic as a pediatric electrophysiologist. He is active in the training and teaching of medical students, residents and fellows, an activity that continuously inspires him. Dr. Aziz is also quite active in research and was the recent recipient of the SADS 2011 Young Investigator Award for his work on long QT syndrome.

Dr Aziz acquired skills in Catheter Ablation of pediatric arrhythmias and device implantation which is a regular part of his clinical practice.



## **Dr. Bassam Estfan**

**Cleveland Clinic**

**estfanb@ccf.org**

Dr. Estfan is a medical graduate from Damascus University. He completed his fellowship training in palliative medicine and oncology at the Cleveland Clinic. Dr. Estfan is a gastroenterologist oncology specialist at the Cleveland Clinic's Taussig Cancer Institute, and an assistant professor at the Cleveland Clinic Lerner College of Medicine and at Case Western Reserve University.





## **Patti DeWitt**

**MIB**

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Patti brings extensive experience working in the life insurance industry, including expertise in life underwriting, automated underwriting transformation and systems, operations leadership, and industry regulations. Prior to joining MIB, Patti was Vice President, Underwriting and Claims Operations at Legal & General America

where she led new business, underwriting and claims administration. Before that, she spent many years at Lincoln Financial Group, with roles of increasing responsibility in underwriting and new business. She holds a BA in Economics from the University of North Carolina. Patti oversees MIB's Code Solutions products and is responsible for MIB's In Force Data Solutions products.



# NOTES





















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