



## AMERICAN ACADEMY OF INSURANCE MEDICINE

116<sup>th</sup> Annual Meeting and Scientific Sessions

September 29 – October 3, 2007

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### EVALUATION QUESTIONNAIRE

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Each year, attendees at the American Academy of Insurance Medicine Annual Meeting and Scientific Sessions are asked to assess the program. Please take the time to complete this Evaluation Questionnaire. Your responses will help in planning for future meetings sponsored by AAIM.

**Note: Place your completed questionnaire in the box at the Meeting Registration Desk. This Evaluation Questionnaire must be completed to receive CME credits.**

If you forget to leave your questionnaire at the meeting, you may mail it to:

AAIM Secretariat  
174 Colonnade Road, Unit 25  
Ottawa, Ontario K2E 7J5  
Canada

**Name of Attendee:** \_\_\_\_\_  
PLEASE PRINT

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### Objectives of the Annual Meeting

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

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### AAIM CME Mission Statement

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To provide insurance medical directors, medical consultants, and nurses with quality continuing medical education in life, health, disability, and long term care insurance. This will be accomplished by lectures, workshops, the introductory course for new medical directors, the triennial review, the annual scientific program, the Journal of Insurance Medicine, and other appropriate programs 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.

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### Evaluation of Individual Scientific Presentations

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For each individual presentation given at the AAIM Annual Meeting and Scientific Program, please rate them in the following categories:

1. Presentation and delivery
2. How well were the learning objectives achieved
3. Hand-out and audiovisual aids
4. Practical value of the content in terms of usefulness to you in your role as a medical director, medical consultant, or nurse for your company

Please refer to the objectives for each individual presentation as you consider each presentation.

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**Monday, October 1 – Morning Session**

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**Bariatric Surgery**

Edward Saltzman, MD

**Objectives**

- Discuss bariatric surgical procedures and their indications
- Compare the weight loss profiles of different surgical procedures with standard treatment
- Discuss perioperative mortality and both the short and long term complications from bariatric surgery
- Review long term morbidity and mortality studies in bariatric surgery
- Discuss factors that may predict better long term results with bariatric surgery

	Disappointing				Superb
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?					<input type="checkbox"/> Yes <input type="checkbox"/> No

Additional comments:

**The Aging Heart**

Daniel Forman, MD

**Objectives**

- Discuss the normal physiologic changes in the aging heart and blood vessels
- Discuss diagnostic and prognostic testing in the elderly including some common EKG findings, ETT prognosticators, EBCT, and CIMT
- Discuss the mortality implications of HTN in the older ages; the prognostic factors that can be assessed by physical exam and the echocardiogram; and how optimal treatment impacts mortality
- Discuss the mortality implications of CAD in the elderly including the role of cardiovascular risk factor control, medical treatment and invasive procedures

	Disappointing				Superb
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?					<input type="checkbox"/> Yes <input type="checkbox"/> No

Additional comments:

## **Pandemic / Avian Influenza: Implications for the Insurance Industry**

Joshua Epstein, PhD

### **Objectives**

Provide insights from a distinguished economist and Senior Fellow at the Brookings Institute on:

- Current threat status
- Morbidity, mortality and social implications
- Risk modeling (specific and generic), pitfalls and reality checks
- Status of contingency planning, globally, nationally and in the corporate environment

	Disappointing			Superb	
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?			<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Additional comments:

## **Emerging Topics in Liver Disease**

Daniel Pratt, MD

### **Objectives**

- Review the latest knowledge in liver diseases, including viral hepatitis and non-infectious entities
- Discuss current diagnostic and treatment strategies
- Review mortality and morbidity implications

	Disappointing			Superb	
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?			<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Additional comments:

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**Monday, October 1 – Afternoon Session**

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**Workup of Abnormal Liver Function Tests**

Daniel Pratt, MD

**Objectives**

- How should someone who presents with abnormal liver function tests be evaluated?
- How can we evaluate mortality and morbidity risks of such people?

	Disappointing				Superb
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?					<input type="checkbox"/> Yes <input type="checkbox"/> No

Additional comments:

**Cognitive Screening in the Insurance Industry – What’s New?**

Bruce Margolis, DO, MBA

**Objectives**

- Understand mortality and morbidity risk of dementia
- Review the continuum of cognitive impairment to dementia
- Understand the concept of Mild Cognitive Impairment (MCI)
- Review the evolution of cognitive screening
- Understand the newest cognitive screening tests, science behind them, and potential use

	Disappointing				Superb
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?					<input type="checkbox"/> Yes <input type="checkbox"/> No

Additional comments:

**How to Judge Good Medical Studies**

Ken Krause, MD

**Objectives**

- Types of clinical studies of interest in Insurance Medicine include:
  - Prognostic studies (risk factors, exposures, diagnosed conditions and mortality)
  - Diagnostic tests
  - Interventions (e.g. treatments)
- Overview of study design
- Methodology for critical assessment of a clinical study using:
  - Checklist for assessment of a published study (examples: Has the study answered the original questions you posed? Can you have confidence in the results?)
  - Good reading practices
  - Examples of articles to illustrate major points

	Disappointing				Superb
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?					<input type="checkbox"/> Yes <input type="checkbox"/> No

Additional comments:

**Common MRI Brain Abnormalities of the Elderly – An Underwriter’s Quandary**

Robert Watson, MD

**Objectives**

- Discuss the presentation and the pathogenesis of the following brain lesions commonly seen on MRIs in the elderly:
  - White matter lesions
  - Silent strokes
  - Lacunar infarcts
  - Cerebral atrophy
- Characterize the morbidity and mortality risk implications of these brain abnormalities

	Disappointing				Superb
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?					<input type="checkbox"/> Yes <input type="checkbox"/> No

Additional comments:

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**Tuesday, October 2 – Morning Session**

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**PVCs: The Good, The Bad, & The Ugly**

Peter Zimetbaum, MD

Objectives

- “PVCs in the normal heart do not affect mortality.”
  - How does one define a normal heart?
  - What studies are necessary?
  - Does this statement hold true in all age groups?
- Does prognosis change with more complex ectopy? Describe:
  - The Lown classification including NSVT
  - The significance of PVCs with stress testing – both with ischemia and without, and with exercise and in recovery
- VT in the normal heart: RVOT VT- prognosis/ does treatment matter?
- Screening for prolonged QTc in first degree relatives of sudden death survivor
- Long-term survival benefit of AICD in “structurally normal hearts”. Any prognostic factors to focus on (number of discharges, echo findings, etc.).
- Relationship between syncope and sudden cardiac death

	Disappointing				Superb
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?					<input type="checkbox"/> Yes <input type="checkbox"/> No

Additional comments:

**The Promise of Targeted Therapy and Genetic Profiling**

Harold Burstein, MD

Objectives

Major advances in targeted therapies and genetic profiling promise to reshape the survival patterns of early stage cancers. Using examples of one or two types of early stage cancers (possibly Her 2+ve early breast cancer and/or early stage colon cancer) describe:

- The benefits and cautions of specific genetic profiles or targeted therapies
- What, if any, have become standards of care with demonstrated all cause mortality benefit?
- What show exceptional promise to become standards of care/staging in 3-5 years?

	Disappointing				Superb
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?					<input type="checkbox"/> Yes <input type="checkbox"/> No

Additional comments:

**International Insurance Issues**

Philip Smalley, MD

**Objectives**

- Discuss the increase in traveling in past years and its impact on morbidity/mortality risks
- Cancers around the world: is there any difference?
- Discuss the current WHO report on the state of world health and any consideration for UW
- What are the best ways to approach the UW of applicants from different areas of the world
- Discuss the following:
  - Findings of murmurs or EKG changes in an APS report from an international applicant (Rheumatic Fever? Chagas? Other?)
  - Threat of Dengue Fever in Latin America and its implications on morbidity and mortality
  - Tuberculosis: a growing threat

	Disappointing			Superb	
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?			<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Additional comments:

**Mood Disorders – Understanding the Morbidity and Mortality**

Maurizio Fava, MD

**Objectives**

Review:

- Current understanding of the neurobiology of mood disorders
- Severity and prognostic indicators
- Mortality risk
- Morbidity risk relating to disability and long-term care

	Disappointing			Superb	
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?			<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Additional comments:

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**Tuesday, October 2 – Afternoon Session**

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**Endocrine Dilemmas – What is the Workup and Evaluation for:****1) Incidentally Discovered Adrenal Masses****2) Thyroid Nodules**

Alison Moy, MD

**Objectives**

## 1) Adrenal Masses

- What is differential diagnosis of an incidentally discovered adrenal lesion?
- What are the radiographic characteristics for benign vs. malignant?
- What is a sufficient clinical and hormonal evaluation?

## 2) Thyroid Nodules

- What is prevalence of thyroid nodules?
- What characteristics (clinical, hormonal, radiographical) suggest benign vs. malignant?
- What is sensitivity and specificity for fine needle aspiration?
- What is the long-term outcome for thyroid nodules that are clinically and/or radiologically monitored?
- Does thyroid hormone suppression affect outcome?

Discuss how the above pertain to life insurance underwriting and compare to expected mortality rates for standard insureds

- Are some people already in the standard risk class?
- What might be some outcomes if they were or were not?

	Disappointing			Superb	
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?			<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Additional comments:

**Underwriting the Aqing Heart**

Lisa Duckett, MD

Daniel Zamarripa, MD

**Objectives**

Demonstrate differences in the importance of cardiac risk factors in underwriting an individual with CAD in applicants of different ages – 65 years, 70 years and 80 years of age – considering age, BP, lipids, glucose

- Does high exercise capacity improve life expectancy in the elderly applicant?
- What is the mortality difference of treating or not treating ventricular arrhythmias (premature ventricular contractions, non-sustained ventricular tachycardia) in individuals of different ages – 65 years, 75 years and 80 years?

	Disappointing				Superb
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?			<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Additional comments:

**Pharmacology and Technology Update in Mood Disorder Treatment**

Dean Knudson, MD

**Objectives**

- Review currently used drugs for mood disorders
- Off-label use of anti-psychotic meds in mood disorders
- Medication use as an indicator of severity and prognosis
- Case studies

	Disappointing				Superb
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?			<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Additional comments:

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**Wednesday, October 3 – Morning Session**

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**Topics in COPD Mortality**

Paul Quartararo, MD, FACP

Objectives

- Discuss new research on COPD morbidity/mortality and related effects of inhaled steroids
- Review current factors important in the mortality prediction of COPD
- Discuss opportunities for spirometry testing in COPD
- Discuss the mortality implications of potential future major surgery with coexistent COPD
- Review imaging findings in COPD that may help predict mortality when pulmonary function testing is not available

	Disappointing				Superb
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?					<input type="checkbox"/> Yes <input type="checkbox"/> No

Additional comments:

**Life Settlements –****Economic Basis, Medical Underwriting and Comparisons to Life Underwriting**

John R. Iacovino, MD

Objectives

- Discuss the medical underwriting methodology for determining life expectancy. Compare and contrast terminology and underwriting approach between traditional medical life underwriting and life expectancy methodologies
- Describe the application of this risk selection methodology in the life settlement market, its economic basis and settlements initiated by policyholders and broker/agents

	Disappointing				Superb
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?					<input type="checkbox"/> Yes <input type="checkbox"/> No

Additional comments:

**An Epidemic of Confusion: eGFR and CKD in Life Insurance Applicants**

Howard Minuk, MD, FRCP (C)

Objectives

Using case examples of varying age and renal status, discuss:

- The underwriting of chronic renal disease using estimated GFR
- The different predictive GFR equations focusing on their:
  - Strengths and weaknesses
  - Impact of their use in life insurance risk assessment

	Disappointing			Superb	
Presentation delivery	1	2	3	4	5
Learning objectives achieved	1	2	3	4	5
Syllabus/handout/audiovisual	1	2	3	4	5
Practical value of the content	1	2	3	4	5
Was the educational content scientifically sound?			<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Additional comments:



5. Were you solicited by sales personnel while you attended an educational activity?  Yes  No

If "Yes" please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. Was there a perceived commercial bias by any of the conference speakers?  Yes  No

If "Yes" please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Did you learn anything you intend to integrate into your practice?  Yes  No

If "Yes", please tell us what it is: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

8. Would you be interested in making a presentation at a future AAIM Scientific Program?  Yes  No

If "Yes" please print your name, your company, and the topic(s) on which you would be interested in speaking:  
\_\_\_\_\_  
\_\_\_\_\_

If "No", please list any suggestions of capable speakers and topic(s) that you may have:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. Please write any comments about the **Scientific Program** in general, any speaker, and/or any topic not already mentioned:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

10. What suggestions do you have for improvements to the annual **Scientific Program**?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

11. What suggestions do you have for improvements to the **Annual Meeting** in general?

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12. Do you plan to attend the 2008 AAIM meeting?  Yes  No

If "No", why not? \_\_\_\_\_

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13. Was this the first AAIM annual meeting you have attended?  Yes  No

14. Please rank the following locations in order of preference as locations for future AAIM meetings:  
(1 most preferred – 5 least preferred)

\_\_\_ New York City \_\_\_ Washington D.C. \_\_\_ San Diego \_\_\_ Miami \_\_\_ Alberta, Canada

15. How do you obtain your CME/Nursing Contact Hours requirements? Check all that apply and indicate the extent of your use: (1 = Very little, 2 = Some, 3 = Most)

- \_\_\_ Industry conferences (AAIM, ACLI, Regional, etc.)
- \_\_\_ Other medical/nursing conferences
- \_\_\_ Internet self study and test
- \_\_\_ Journal self study and test
- \_\_\_ MKSAP, ACP, etc.
- \_\_\_ Other (please specify) \_\_\_\_\_

16. How do you obtain the continuing education not related to CME/Nursing Contact Hours to meet the needs of your job? Check all that apply and indicate the extent of your use:  
(1 = Very little, 2 = Some, 3 = Most)

- \_\_\_ Industry conferences (AAIM, ACLI, Regional, etc.)
- \_\_\_ Other medical/nursing conferences
- \_\_\_ Internet self study and test
- \_\_\_ Journal self study and test
- \_\_\_ MKSAP, ACP, etc.
- \_\_\_ Other (please specify) \_\_\_\_\_

17. Are you interested in participating on an AAIM committee?  Yes  No

If "Yes" please print your name and your company and check the committee(s) in which you have an interest:

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- Continuing Medical Education
- Membership and Credentials
- Mortality and Morbidity
- Professional and Public Relations
- Marketing
- 2008 Annual Meeting Scientific Program Committee

List committees in which you currently participate: \_\_\_\_\_

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18. Have you visited the AAIM website?  Yes  No

If "No", why not? \_\_\_\_\_

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19. Are you aware that the Newsletter and Membership Roster are on the website at [www.aaimedicine.org](http://www.aaimedicine.org)?  Yes  No

20. Were the facilities at The Fairmont Copley Plaza conducive for learning?  Yes  No

If "No" please explain: \_\_\_\_\_

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21. Rate The Fairmont Copley Plaza in terms of its quality, services, and staff:

Poor	Fair	Good	Excellent
1	2	3	4

22. Please rank your preference for the social event typically held on Tuesday evening?

- \_\_\_\_\_ Dinner Dance
- \_\_\_\_\_ Dinner followed by entertainment by a comedian
- \_\_\_\_\_ Dinner followed by entertainment by a musician
- \_\_\_\_\_ Light musical entertainment with dinner
- \_\_\_\_\_ Longer social gathering before dinner with nothing following dinner
- \_\_\_\_\_ Other (please specify) \_\_\_\_\_

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