



Richmond County Medical Society

1st Annual Conference for Physicians

Offering CME credits

Sponsored by



Wednesday, March 16th, 2011

8:30am to 12:30pm

The Vanderbilt at South Beach
300 Father Capodanno Boulevard
Staten Island, NY 10305

Continental Breakfast & Lunch will be provided

Who should attend?

(a) Physicians who are interested in knowing more about the effects caused by the recent health care legislation changes; tax reforms that affect them personally and in their practice; controlling and reducing insurance costs; improving opportunities to borrow funds and save money; (b) Accountants and other Financial Advisors to Physicians and (c) Physicians' Office managers.

Program Objectives:

Accountable Care Organizations (ACO)

Recent legislation has created ACO's. Do physicians have choices? Find out who can form an ACO? What are the requirements for an ACO? Do the benefits outweigh the negative aspects of an ACO?

Speaker: Dr. Mark P. Jarrett, M.D., MBA, Chief Medical Officer of Staten Island University Hospital. (see reverse side for more details)

Malpractice Insurance- Traditional vs. Captive Insurance

Find out the myths and reality of captive insurance companies; controlling and reducing insurance costs; techniques to manage insurance and the related tax benefits now and as they relate to a physician's estate.

Speaker: Robert E. Bertucelli, CPA, CFP®, CLU, is with the firm of Satty, Levine & Ciacco, CPAs, P.C.

Speaker: David N. Kotowski, President of Elevated Consulting Group (see reverse side for more details)

Tax Issues Affecting the Medical Profession

Learn about tax reform under the Small Business & Tax Relief Job Act of 2010; advanced tax and business planning strategies and wealth transfer opportunities for physicians.

Speaker: Fred LaMarca, CPA, CFP®, partner with Potter & LaMarca LLP (see reverse side for more details)

Smart Way to Deal with a Banker

Know the parameters to obtaining money, refinancing it, and maintaining credibility; get negotiating tips to help bridge the gap that separates you from your bank and banker.

Speaker: John J. Amodio, Vice President, TD Bank (see reverse side for more details)

Great Credit Brings Great Opportunity

Get tips on credit; different credit scoring systems; and learn if increasing credit scores can turn into savings.

Speaker: Tracy Becker, President of North Shore Advisory, Inc. (see reverse side for more details)

Registration Fee:

Members of RCMS & the Academy of Medicine or their staff & Customers of TD Bank admitted

FREE; All others pay \$50.00

Check made payable to:

Richmond County Medical Society

460 Brielle Avenue

Admin. Bldg.; Rm. 202

Staten Island, NY 10314

* For more information call 718-442-7267 or 718-313-2005 or email execrcms@aol.com

Continuing Medical Education:

This activity has been planned and implemented in accordance with the Essential Areas and Policies of the Medical Society of the State of New York (MSSNY) through the joint sponsorship of the *Academy of Medicine of Richmond and The Richmond County Medical Society*. The Academy of Medicine of Richmond is accredited by the Medical Society of the State of New York to provide continuing medical education for physicians.

The Academy of Medicine of Richmond designates this educational activity for a maximum of 3 hours of AMA PRA Category 1 credit™. Physicians should only claim credit commensurate with the extent of their participation in the educational activity.

Partial support for this program has been provided by unrestricted funds from TD Bank. All educational grants for Continuing Medical Education programs sponsored by the *Academy of Medicine* are in strict compliance with the guidelines of the Accreditation Council for Continuing Medical Education (ACCME). A copy of these standards for commercial support is available upon request.

The *Academy of Medicine of Richmond* relies upon invited faculty participants in its CME programs to provide educational information that is objective and as free of bias as possible. In this spirit, and in accordance with guidelines of the program sponsor, faculty participants are expected to indicate any commercial relationship that might be perceived as a real or apparent conflict of interest.

More Information about the Speakers

John J. Amodio, Vice President, TD Bank, one of the 15 largest commercial banks in the United States. He is responsible for establishing both lending and deposit relationships with individuals and businesses, especially on Staten Island. Mr. Amodio has over 40 years experience in financial services, management and marketing. He has had his own management consulting firm assisting chief executive officers and other top management personnel of various industries in the development and implementation of strategic plans. He has been the president and CEO of a community oriented commercial bank and the president of a corporation that operated well-known restaurants. Besides being a CPA, he is also a past Chairman of the Staten Island Chamber of Commerce and past President of the Staten Island Chapter of the New York State Society of CPA's.

Tracy Becker, President of North Shore Advisory, Inc., a respected credit education and restoration company. She is an acknowledged industry expert who publishes biweekly articles for the thousands of professionals she works with, enabling them to sort through the vast misinformation and confusing credit data. She has recently been interviewed by NBC television, Bankrate.com, Wallet Pop, Investment News, Westchester County Business Journal, and is in demand for her credit expertise and insight. Ms. Becker is the author of two books about credit and scores and has another due to be released soon.

Robert E. Bertucelli, CPA, CFP®, CLU, is with the firm of Satty, Levine & Ciacco, CPAs, P.C. The firm, in addition to providing traditional auditing, accounting, tax and consulting services to their clients, also provides advice and counsel to other CPA's and practitioners. They have become experts in captive insurance companies for physicians. Mr. Bertucelli is a partner with the Firm; a professor of Accounting and Taxation at C.W. Post Campus of Long Island University; and has over 25 years of experience to share.

Dr. Mark P. Jarrett, M.D., MBA, Chief Medical Officer of Staten Island University Hospital. He also serves as the designated Institutional Official for Graduated Medical Education at the hospital and as Chairman of the Graduate Medical Education Committee. Academically, Dr. Jarrett holds the Faculty position of Clinical Professor of Medicine and Clinical Associate Dean at Downstate Medical School, SUNY Health Science Center at Brooklyn and Professor of Medicine at the newly approved Hofstra Medical School. Additional to his responsibilities at SIUH, Dr Jarrett is a practicing physician for 28 years, specializing in Rheumatology. Dr. Jarrett pursues and researches issues related to quality of care.

David N. Kotowski, is President of Elevated Consulting Group. ECG is a contingency consulting firm that gets compensated based on results rather than fees. ECG specializes in three key areas: Expense Optimization – Benefit Maximization – Tax Reduction. David has the expertise and drive of being an entrepreneur while also having the successful management skills of working in large prestigious organizations. He has over 20 years of finance, sales and marketing, banking and consulting experiences assisting a wide range of companies from Wall Street to Main Street.

Fred LaMarca, CPA, CFP®, partner with Potter & LaMarca LLP, one of Staten Island's most respected CPA firms. He is a CPA for more than 30 years specializing in providing tax, financial and consulting advice to individuals and businesses and has numerous clients in the medical profession. Mr. LaMarca is a Certified Financial Planner and holds various securities and insurance licenses. He is also a past Chairman of the Staten Island Chamber of Commerce and past President of the Staten Island Chapter of the New York State Society of CPA's.

Please complete below the dotted line and return before **March 11th** to:

The Richmond County Medical Society

460 Brielle Ave.; Administration Building; Room 202; SI, NY 10314

RCMS 1st Annual Conference for Physicians (Sponsored by TD Bank) - Wednesday, March 16, 2011

Physician's Name: _____ MD / DO

Phone: _____ E-mail: _____

Attendee Name(s): _____

Attendee Name(s): _____

Attendee Name(s): _____

Amount enclosed: \$ _____

Check if a Member of Academy/Society

Check if Customer of TD Bank