General
Established in 1954 and originally named The Educational & Scientific Trust
Renamed The Foundation of the Pennsylvania Medical Society in 1998
Established as the philanthropic affiliate of the Pennsylvania Medical Society

PROJECTS/EVENTS OF THE 1950s and 1960s

Public Health Era
Implemented Committee on Preventive Medicine and Public Health
Established local county health departments/surveys
Designed professional education program to promote community health
Published The Physician and Public Health newsletter (circulation - 24,000)
Hosted medical students at annual health conference
Assumed responsibility for Society’s Educational and Scholarship Fund

PROJECTS/EVENTS OF THE 1970s

Student Financial Aid Era
Established Health Careers Financial Aid Fund of the Pennsylvania Medical Society Auxiliary to provide loans for students in the paramedical field
Combined loan and scholarship accounts to make all assets available for loans
Supported Medical Care Appraisal project through corporate grants
Established funds to encourage physician practices in rural area of the state

As we celebrate the 60th Anniversary of the Foundation we’d like to take a moment to look back on the events that established the organization and the dedication it has shown to medicine in Pennsylvania over the decades.

Raymond C. Truex, MD
Chair, Board of Trustees
2007 – Present

I’ve had the privilege to watch the Foundation evolve over the past 28 years, and it has been my honor and distinct pleasure to serve as chair of the Board of Trustees. I’ve never known a more passionate, compassionate and committed group of people who are making a difference in the lives of their colleagues. The medical profession is demanding and these leaders exemplify what is at the essence of our pledge – caring for one another. I’ve been told by many that the Foundation is the most important organization in their life. Your financial support can make a difference in the future of medicine in Pennsylvania.

continued on page 4
The year 2014 marked our 60th birthday at the Foundation of the Pennsylvania Medical Society. From humble beginnings, three visionary board members identified public health needs in their counties and through a grant created a response that included establishing local county health departments and implementing county health surveys.

As the Foundation focused on public health and equipping physicians to meet the health needs of their respective communities, the Foundation, then known as “the Trust,” also identified the need to provide resources so more individuals could attend medical school. Our 2013 video shares the story of Virginia Hall, MD, medical student and loan borrower from the 1960s who has gone on to do great work at the Penn State Milton S. Hershey Medical Center. Not only has she delivered hundreds of babies, she has also served as faculty to our current loan and scholarship recipients and she has thoughtfully offered wisdom to guide our Foundation programs by serving as a trustee.

Responding to critical medical community needs has remained the hallmark of Foundation programming. In the 1980s the Physicians’ Health Programs was established to offer physicians support if they suffer from impairment including addiction and mental health concerns. Through the years all of our trustees have asked critical questions that include: How can we equip physicians to better care for patients and improve the health of our communities? How can we address sensitive issues and responsibly care for our own physician community?

In the 2000s the Foundation established LifeGuard®, a clinical skills assessment program that offers an individualized pathway for remediation. Once again, the Foundation has addressed a critical need within the physician community to fairly and objectively assess clinical skills, and when warranted, offer remediation that is customized to the identified deficiency.

It is with deepest gratitude to the many trustees, former executive directors and dedicated staff (past and present) that I say, “Thank you for your vision, courage, generosity and tenacity that has brought us to this 60th milestone.” With the support of our physician community and many individual gifts of time, talent and philanthropic treasure, I am confident that the Foundation will be prepared to respond to the current and emerging needs of physicians.

Heather A. Wilson, MSW, CFRE
Executive Director
The Foundation has always focused on important work, and during my time leading the organization we were fortunate to have visionary and dedicated board members and leaders who were willing to work hard and cooperate on ideas to shape what the Foundation is today. The world was changing for PAMED and we saw opportunities for growth that paid off. We started to support the medical groups with accounting which they still use today and that helps to pay for other charitable work. The Foundation became a very important aspect in the armament and activities of the Society as a whole. It remains a positive force today!

Abram M. Hostetter, MD
Chair, Board of Trustees
1986-2002

During my time as board chair we saw significant developments. We changed the name from the Educational & Scientific Trust to the Foundation of the Pennsylvania Medical Society to better reflect the identity of the organization. We always worked to fund students and education but then we incorporated what is now the Physicians’ Health Programs into the Foundation to impact the lives of doctors. The Foundation offers universal influence in the lives of physicians – whether they are students or well into their practice. The organization, now in its 60th year, has grown a tremendous amount since the days when we were seemingly a small committee with one staff person. The Foundation is now thriving with the recent emphasis on competency retraining and offering this kind of assistance to physicians and hospitals.

Virginia B. Henning, CPA
Executive Director
2003 – 2012

During my time as executive director of the Foundation, we were fortunate to have inspirational physician leaders who were passionate about our mission.

Gerald W. Pifer, MD
Chair, Board of Trustees
2003-2006

My time as board chair was one of the most satisfying affiliations of my career. The decisions we made for the non-profit could be seen immediately such as the amount of student loans and scholarships that we provided to students who were in need of funding. Being a physician is one thing, but having the chance to truly help a colleague is gratifying. We worked hard to direct the PHP to become the failsafe that saves a career and a family. Every day that a physician we helped is sober and practicing is a reward. The Foundation does so many good things for our fellow doctors.

Heather A. Wilson, MSW, CFRE
Executive Director
2012 - Present

Today our Foundation is focused on the physicians as individuals. When physicians are healthy and well, they are better able to care for their patients. Our Board of Trustees have honed their listening skills to respond to the real-time needs of physicians. They continually assess our current programs and make recommendations for change or the creation of new supportive services that answer the questions: Are you well? Are you competent in your clinical practice? Do you have the financial resources to access a medical school education? Our trustees have courageously guided our programs to address the tough human concerns that affect all individuals, including physicians.
PROJECTS/EVENTS OF THE

1980s

Seeking the Trust’s Purpose

Assumed responsibility for the Physicians’ Health Programs
Sponsored first marketing seminar for health care programs
Completed Agent Orange publication
Produced educational materials for physicians in managing arthritis
Studied screening and detection practices for breast, colon and cervical cancers
Developed training and educational materials on elder abuse

PROJECTS/EVENTS OF THE

1990s

Adjusting our Mission in Response to Rapid Change

Created Medical Legacy Fund
Assumed Medical Benevolence Program from Medical Society
Introduced Connections: News from the Educational & Scientific Trust newsletter
Developed PHP statewide network to work locally with impaired colleagues
Developed PHP’s hospital impairment policy
Established Keystones of Public Health
Initiated domestic violence prevention campaign
Established Institute for Physician Leadership
Conducted financial management seminars for medical students

PROJECTS/EVENTS OF THE

2000s

Adopting Mission-Focused Philanthropy

Developed planned giving program
Expanded scholarship opportunities for medical students
Established PHP Endowment Fund
Added LifeGuard® to Foundation suite of services
Engaged multi-media platforms to increase communication and expand outreach

Don’t wait for the next newsletter to see what we’ve been doing—visit us online!

‘Like’ us on Facebook and follow us on Twitter!

www.foundationpamedsoc.org

Karen A. Rizzo, MD, FACS
Lancaster Physician Sworn in as 165th President of the Pennsylvania Medical Society

The Foundation congratulates Karen A. Rizzo, MD, FACS, an otolaryngologist/ENT from Lancaster, who was sworn in as the 165th president of the Pennsylvania Medical Society (PAMED) in October, during the organization’s annual statewide meeting held in Hershey, Pa.

Swearing Dr. Rizzo into office was John J. Pagan, MD, chairman of PAMED’s Board of Trustees and a general surgeon in Bucks County. More than 400 guests and dignitaries attended the ceremony including Pennsylvania’s Physician General Carrie DeLone, MD, and medical leadership from the Wisconsin, Delaware, and Ohio state medical societies. In addition representatives from the American Medical Association, Pennsylvania Bar Association, and Pennsylvania Dental Association attended the event.

A 29-year member of PAMED, she served on its board of trustees from 2003 to 2011 as a surgical specialty trustee. She was vice chair of the board from 2009 to 2011. Currently, Dr. Rizzo is a member of PAMED’s Political Advocacy Council, Task Force on State of Medicine, and Task Force to Improve Governance Processes and Structures. She also has aided several other councils in the past and served as the chair of the Specialty Leadership Cabinet from 2009 to 2011.

Since becoming a physician, Dr. Rizzo has been active in several medical organizations and has made humanitarian trips to Vietnam, South Africa, and Egypt. In addition to being a member of PAMED, she holds memberships in the American Medical Association and was president of Lancaster City & County Medical Society from 2008 to 2010. She was also president of the state chapter of the American Academy of Otolaryngology/Head & Neck Surgery from 2001 to 2003, and a member of the Keystone Chapter of the American College of Surgeons. Currently, she is on the Board of Governors for the American Academy of Otolaryngology/Head and Neck Surgery.

Outside of organized medicine, Dr. Rizzo is an active alumna of Villanova University. She was inducted into the Philadelphia Big Five and Villanova University Basketball Hall of Fame.

Dr. Rizzo is a graduate of the Temple University School of Medicine, and currently practices medicine at Lancaster Ear, Nose, and Throat. In addition, she is a magna cum laude graduate of Villanova University.

She and husband Jay, a general dentist, reside in Lancaster. They have two daughters, Nicole and Marci. Welcome Dr. Karen Rizzo!
The Heart and Muscle of PAMED:

A Bet Gets Physicians Inspired

You can take the doctor out of the practice or hospital, but you can’t take the competition out of the doctor. Two physicians recently made a bet that could make a big difference.

It was at the Pennsylvania Medical Society’s (PAMED’s) House of Delegates and Annual Education Conference, Oct. 17-19 in Hershey. The two physicians — one from the Second District (John Pagan, MD) and one from the Fifth District (Margaret Atwell, MD) — made a bet of whose district could get the highest percentage of delegates contributing to the Foundation of the Pennsylvania Medical Society and the Pennsylvania Medical Political Action Committee (PAMPAC) throughout the weekend.

The competition was both fierce and friendly.

Updates were sent to the two groups throughout the weekend. Physicians were pumped up about giving and enthusiastic about contributing to the cause.

“Dr. Pagan had the idea for the competition and it seemed that physicians were inspired on the spot,” said Dr. Atwell. “I jumped on the bandwagon with him, and we set an amount,” she said.

“At the House of Delegates, I shared my thoughts that if you value the time that you are spending this weekend thinking about medicine in Pennsylvania and how it can get better, you have to walk the walk in addition to talking the talk,” said Dr. Pagan.

“PAMPAC is the muscle of PAMED, and the Foundation is its heart,” he said. “If not you, doctor, then who?” Dr. Pagan often asks his colleagues.

Drs. Pagan and Atwell extended the bet, and encourage all physicians to consider contributing to the cause. What’s the cause some people may ask?

THE FOUNDATION

The Foundation, a subsidiary and the charitable arm of PAMED, offers scholarships and low-interest loans; a Physicians’ Health Programs (PHP) that helps physicians and physician assistants who may be experiencing addiction, physical or mental challenges, or work-related stress; and LifeGuard,® a program that helps physicians who need clinical skills assessment or clinical remediation.

“Foundation programs such as LifeGuard, the PHP, and scholarships for medical students express physicians’ altruism and compassion in a very physician-specific context and enhance the health and safety of us all as well as our patients,” said Dr. Atwell.

“The Foundation is where our doctors can take care of their own,” said Dr. Pagan. “Students that need loans to train in Pennsylvania and hopefully then stay and care for patients thereafter; physicians who were injured or out of practice for a period of time or have fallen behind in their clinical skills need LifeGuard; and physicians struggling with addictions and severe stress need the PHP,” he said.

“The Foundation provides all of these valuable programs, programs where Pennsylvania doctors help take care of our own,” he continued. “As a core part of the PAMED mission, we need to make sure that our doctors all have the tools they need to take the best care of Pennsylvania patients that they can.”

Drs. Pagan and Atwell were proud to announce 100 percent membership in PAMPAC and participation in the Foundation from PAMED’s Board of Trustees — “a true example of our leaders practicing what we preach,” said Dr. Pagan.

“Dr. Atwell and I decided to continue the rivalry a little longer to determine which district is truly the leader in heart and muscle,” said Dr. Pagan. “Go District 2!” he cheered. “Go District 5, beat District 2!” responds Dr. Atwell.
Pennsylvania Medical Students received the Alliance Medical Education Scholarship offered through The Foundation of the Pennsylvania Medical Society. AMES presented the awards at a House of Delegates event in October in Hershey, Pa.

This year’s recipients are:

**JOSEPH M. ANDRIE**, son of Mario and Norma Andrie, of Reedsville, is a third-year medical student at Penn State College of Medicine. He intends to specialize in family medicine. He will receive $2,500 to apply to his tuition.

**KATHLENE T. BABALOLA**, of Pittsburgh, daughter of (late) Dr. Banji and Mrs. Florence Babalola, is a fourth-year medical student at University of Pittsburgh School of Medicine. She intends to specialize in emergency medicine. She will receive $2,500 to apply to her tuition. Babalola was named a 2013 AME Scholarship winner and the Allegheny County Medical Society scholarship recipient for a grand total of $7,500 in merit awards.

**MITCHELL B. CRAWFORD**, of Lancaster, is the recipient of the Alliance Medical Education Robert & Arlene Oyler Award Scholarship offered through The Foundation of the Pennsylvania Medical Society. Crawford, son of Marjorie Paradise, of Conestoga, and Scott Crawford, of Millersville, is a fourth-year medical student at Philadelphia College of Medicine where he intends to pursue psychiatry. He will receive $3,000 to apply to his tuition. Crawford was also named a scholarship winner in 2013 for a grand total of $5,500 in merit awards.

**ORIANA C. HUNTER**, daughter of John and Adrienne Hunter, of Pittsburgh, is a third-year medical student at the University of Pittsburgh School of Medicine where she will specialize in cardiology. She will receive $2,500 to apply to her tuition.

**LAUREN E. KRAMER**, daughter of Mark and JoAnne Kramer of Oakford, is a fourth-year medical student at Philadelphia College of Medicine. She will receive $2,500 to apply to her tuition. Kramer was named a 2013 AMES winner for a grand total of $5,000 in merit awards.

**DEREK M. MCQUADE**, of Pittsburgh, is the recipient of the Alliance Medical Education Scholarship Dr. William J. West, Jr., Award offered through The Foundation of the Pennsylvania Medical Society. McQuade, son of Mark and Kathleen McQuade, of Pittsburgh, is a third-year medical student at the Drexel University College of Medicine. He will receive $2,500 to apply to his tuition.

**MATHWELL A. MURPHY**, son of Kenneth and Renee Murphy of Scranton, is a fourth-year medical student at Sidney Kimmel Medical College at Thomas Jefferson University, Philadelphia. He intends to specialize in internal medicine. He will receive $2,500 to apply to his tuition. Murphy was named a 2013 scholarship winner for a grand total of $5,000 in merit awards.

**MICHAEL G. TECCE**, son of Alberto and Rose Marie Tecce, of Chalfont, is a fourth-year medical student at Philadelphia College of Osteopathic Medicine. He intends to become a surgeon. He will receive $2,500 to apply to his tuition.

The Pennsylvania Medical Society Alliance, a statewide volunteer group, is dedicated to healthy communities and the preservation of the doctor-patient relationship. The group has awarded its Alliance Medical Education Scholarship Fund for more than a decade to benefit deserving medical students. This award is possible thanks to contributions from Alliance members, general and memorial contributions. The organization also holds an annual fundraiser.

For information about this scholarship, call the Foundation’s Student Financial Services office at (717) 558-7852, or visit www.foundationpamedsoc.org.

Pictured (front row, l-r) Oriana Hunter; Barbara Prendergast; Lauren Kramer; Kathlene Babalola; Karen Rizzo, MD; Caryl Schmitz; Arlene Oyler; (back row, l-r) Joseph Andrie; Mitchell Crawford; Michael Tecce; Matthew Murphy; and Derek McQuade.
At the House of Delegates annual business meeting in Hershey, The Foundation premiered a new video about its programs and services. The Foundation is your “Shelter from the Storm” during life’s most challenging moments. Please visit our website www.foundationpamedsoc.org to watch our video.

“LifeGuard can help hospitals and physicians provide the best and safest care to our patients.”
Helen Kuroki, MD, Vice President of Medical Affairs, Riddle Hospital

“I cannot imagine the future if it doesn’t include a healthy, strong PHP and Foundation.”
Dean Steinberg, MD, Vice Chair, Anesthesiology Methodist Division, Thomas Jefferson University Hospital

“The community of doctors is a lot about giving back and helping the younger generation. The Foundation really exemplifies that.”
Hallie Rozansky, Loan and Scholarship Recipient

We are proud of Foundation Board Trustee Donald Parlee, MD, who accepted the R. William Alexander, MD, Award recognizing political involvement and advocacy. PAMED political action committee (PAMPAC) initiated the R. William Alexander, MD, Award in 2001 to recognize grassroots political involvement and advocacy that is an asset to the organization.

“Don Parlee, MD, deserves the R. William Alexander Award. He has been actively engaged in grassroots advocacy for physicians, patients, and the medical profession in Pennsylvania over many years. He is always ready to answer the call to be enthusiastically engaged in an essential initiative,” said Marilyn Heine, MD, past PAMED president. “During his years in practice and now retired, his level of involvement, insight, and commitment are inspiring. The rapport he develops with elected officials and the respect he commands as a thoughtful, informed leader have helped advance PAMED’s advocacy agenda,” she said.

The PAMPAC Board selects the award winner(s) each year. Dr. Alexander, who practiced Radiology and resided in Reading, was a longtime advocate for PAMPAC. He served on the PAMPAC board, as president of PAMED, on the PAMED Delegation to the AMA and as PAMPAC chair.

The Foundation invites you to recognize and celebrate Dr. MacLeod’s service as Pennsylvania Medical Society’s 164th president by making a contribution to the Society’s Foundation. Dr. MacLeod, an emergency physician who practices in Allegheny County, completed his term of office as PAMED president on Oct. 18, 2014, at the House of Delegates. Your gift made in his honor supports The Foundation of the Pennsylvania Medical Society – the charitable arm of PAMED.

Congratulations to Foundation Board Member Virginia Hall, MD, FACOG, FACP for being elected as an alternate delegate to the AMERICAN MEDICAL ASSOCIATION!
PHP MEDICAL DIRECTOR PRESENTATIONS

WE CAN MAKE THE FOLLOWING ONE HOUR CME PRESENTATIONS AT YOUR WORKPLACE:

Addiction/Physician’s Health Programs Overview

EDUCATIONAL OBJECTIVES:
To increase awareness of addiction and other causes of physician impairment.
To provide practical advice for physicians re: how to identify addiction & advise their colleagues.
To provide a brief overview of the Foundation's Physicians' Health Programs.

Addressing Physician Burnout/Stress

EDUCATIONAL OBJECTIVES:
To increase awareness of the causes of physician burnout and stress.
To provide practical advice for physicians on how to deal with physician stress/burnout.
To provide a brief overview of the Foundation’s Physicians’ Health Programs.

Presenters: Jon Shapiro, MD, or Cliff Lyons, MD. Call us at 717.558.7819 to schedule a date!

Our Services:

Reentry
External Peer Review Assessment
Aging Physician Assessment
Self Assessment

Individualized Physician Clinical Assessment and Remediation Services

About LifeGuard: Because of the complexities associated with the practice of medicine, situations arise when physicians need an objective clinical assessment in order to demonstrate medical knowledge and clinical skills. LifeGuard is an individualized program that provides these clinical assessment services. Additionally, LifeGuard offers clinical remediation services when a problem or deficit is identified.

A Customized Approach: LifeGuard services are uniquely tailored to the individual needs and specialty of each physician. We are focused on providing physician and referral participants with the respect, unbiased support, and services they require.

More Information: Call us or visit our website for more information:
717-909-2590 • www.LifeGuardProgram.com

MEDICAL SCHOOL NEWS IN BRIEF

The Commonwealth Medical College (TCMC) in Scranton, Pa., was granted full accreditation in July 2014 from the Liaison Committee on Medical Education (LCME). This certifies that the newest medical school meets national standards for structure and function. The Middle States Commission on Higher Education also has granted TCMC full accreditation this past summer.

Jefferson Medical College in Philadelphia, Pa., announced in late June that the college has been renamed the Sidney Kimmel Medical College at Thomas Jefferson University. The name change was to honor the single largest gift to the institution from the Sidney Kimmel Foundation.

The Doctors Company Foundation announced the 2015 Young Physicians Patient Safety Award. Six awards of $5,000 each, plus registration, travel and accommodations to the Association of American Medical Colleges 2015 Integrating Quality Meeting in Chicago, in June 2015, will be given to recognize young physicians who share their personal essay about a patient safety event that impacted their learning and growth. The award is open to all third- or fourth-year medical students attending a medical school in the United States and enrolled on July 1, 2014. Deadline is Feb. 2. Go to www.tdcfoundation.com for details.

The 2014-2015 state budget included a $1 million increase in the state’s Primary Health Care Practitioner Program. This funding — a more than 27 percent increase from the previous year — will provide additional opportunities for medical student loan forgiveness and create new primary care residency slots. Pennsylvania physicians and physicians-in-training, along with PAMED, advocated for loan repayment assurance as a strategy to retain more physicians and meet the commonwealth’s growing health care needs. Visit www.pamedsoc.org.

MEDICAL SCHOOL NEWS IN BRIEF

The Commonwealth Medical College (TCMC) in Scranton, Pa., was granted full accreditation in July 2014 from the Liaison Committee on Medical Education (LCME). This certifies that the newest medical school meets national standards for structure and function. The Middle States Commission on Higher Education also has granted TCMC full accreditation this past summer.

Jefferson Medical College in Philadelphia, Pa., announced in late June that the college has been renamed the Sidney Kimmel Medical College at Thomas Jefferson University. The name change was to honor the single largest gift to the institution from the Sidney Kimmel Foundation.

The Doctors Company Foundation announced the 2015 Young Physicians Patient Safety Award. Six awards of $5,000 each, plus registration, travel and accommodations to the Association of American Medical Colleges 2015 Integrating Quality Meeting in Chicago, in June 2015, will be given to recognize young physicians who share their personal essay about a patient safety event that impacted their learning and growth. The award is open to all third- or fourth-year medical students attending a medical school in the United States and enrolled on July 1, 2014. Deadline is Feb. 2. Go to www.tdcfoundation.com for details.

The 2014-2015 state budget included a $1 million increase in the state’s Primary Health Care Practitioner Program. This funding — a more than 27 percent increase from the previous year — will provide additional opportunities for medical student loan forgiveness and create new primary care residency slots. Pennsylvania physicians and physicians-in-training, along with PAMED, advocated for loan repayment assurance as a strategy to retain more physicians and meet the commonwealth’s growing health care needs. Visit www.pamedsoc.org.
Ryan J. Hanson, of Presto, Pa., in Allegheny County, is the recipient of the Scott A. Gunder, MD, Dauphin County Medical Society Presidential Scholarship offered through The Foundation of the Pennsylvania Medical Society. Hanson, a third-year medical student at Penn State College of Medicine, will receive $1,500 toward his tuition.

He is the son of Joseph and Mary Jane Hanson, of Presto.

Hanson, an Allegheny College graduate, said that witnessing his father in the intensive care unit after a skiing accident and the subsequent care his father received from physicians encouraged Hanson to pursue a medical degree. “I had some desire to become a doctor, however, it was intangible and mostly consisted of vague feelings of wanting to help others and make the world a better place,” Hanson said. “During the time of my father’s hospital stay, my aspiration crystallized into something much more concrete and is now deeply personal,” he said.

The physician treating Hanson’s father provided “immutable emotional support” that made his father believe that he would eventually heal. That physician engendered in Hanson the notion that “we have many opportunities for acts of kindness, for unhurried attention and that the impact of a few minutes can affect a lifetime.” Hanson’s goal, inspired by that physician, is to emulate that demeanor when he is a doctor.

Since 2000, the Foundation has awarded the Scott A. Gunder, MD, Dauphin County Medical Society Presidential Scholarship to a second-year medical student attending Penn State College of Medicine. Through this scholarship, the memory of Gunder, a 39-year-old Harrisburg gastroenterologist will continue.

For information about scholarships, call the Foundation’s Student Financial Services office at (717) 558-7852.

---

**EVALUATION OF HEALTHCARE PROFESSIONALS**

by Jon Shapiro, MD

PHP Medical Director

The Pennsylvania Physicians’ Health Programs (PHP) monitors a variety of healthcare professionals (HCPs) - physicians, physician assistants, dentists, dental hygienists, expanded function dental assistants and medical students. The process of assisting HCPs might be broken down to evaluation, treatment, monitoring and advocacy. Let’s begin by reviewing referral to the PHP and the process of evaluation.

Professionals are referred to PHP through many sources. We receive referrals from spouses, friends, co-workers, employers as well as self-referrals. There has been a recent increase in the number of referrals from the Board of Medicine caused by a history of driving under the influence (DUI). These referrals occur when the applicant checks a box on the application/renewal form indicating a history of a DUI. Alternatively, the HCP may be reported to the Board of Medicine by JNET. JNET is a web-based information sharing portal for agencies in the Commonwealth of Pennsylvania. This sharing of information regarding DUI arrests has led to an increase in referrals from the state to PHP.

When the PHP receives a referral for a HCP with a possible problem, they are referred to an independent evaluator. The PHP staff obtains the appropriate releases so that we may report back to the referral source. Our case managers always strive to give the HCP a choice of evaluators that are suited to his/her individual circumstances. The evaluator will interview the HCP, perform drug tests and obtain information from collateral sources. If no impairment is diagnosed, the PHP will notify the referral source and the individual referred of the outcome. When the referral comes from the State Board, the HCP’s license will be issued and no PHP monitoring will be required. If a substance abuse or psychiatric problem is defined, then the physician or HCP is given a choice of treatment centers suited to their problem.

Depending on the complexity of the case, an evaluation may take anywhere from one to five days. Evaluations can be an expensive and time-consuming endeavor, but they are an essential step in assisting HCPs in need. The PHP prefers to work with evaluators and treatment centers with experience in dealing with HCPs. We have no affiliation with particular centers or financial conflicts of interest. Whenever possible, the PHP offers a choice of clinicians to support the HCP’s autonomy.

For more information regarding the treatment process for HCPs with substance abuse and psychiatric diagnoses, email us at php-foundation@pamedsoc.org.
YEAR END PLANNING STRATEGIES

As the year comes to a close, this may be an excellent time to look at last minute planning strategies. Many of these strategies may help reduce your current taxable income. Prior to implementing any of these strategies it is recommended that you consult your personal tax advisor for specific details regarding your personal situation.

1. **Give to a charity, like the Foundation, with 501(c)(3) tax exempt status** – Consider giving appreciated stocks or mutual fund shares that you have owned more than one year. Your charitable deduction is the fair market value of the securities on the date of the gift, not the amount you paid for the asset. There are limitations on how much you can deduct. This only works if you are eligible to itemize your deductions.

2. **Make maximum contributions to your 401(k)/403(b)** – Contributions to these plans or similar employer-based plans are excluded from your income thus lowering your tax bill. This year you can contribute $17,500 to employer based plans and if you are over age 50, you can contribute additional $5,500.

3. **Review your non-qualified investment portfolio** – Taxpayers in higher brackets should look for losses to offset investment gains. Offsetting gains is particularly important to taxpayers in the 39.6 percent tax bracket because they face taxes of up to 23.8 percent on dividends and long-term capital gains.

4. **Convert your IRA to a ROTH** – If you think your tax rate is going to rise sometime in the future, converting to a ROTH this year makes a lot of sense. Withdrawals from traditional IRAs are taxed at your ordinary income tax rate. Withdrawals from a ROTH are tax-free and penalty-free as long as you are at least age 59 1/2 and the account has been open for at least five years. You do have to pay taxes on any pretax contributions and earnings in your traditional IRA for the year you convert. Keep in mind that after the conversion, you can change your mind. You have until Oct. 15, 2015, to undo the conversion and turn your ROTH back into a regular IRA.

5. **Plan your itemized deductions** – If you expect your income to drop next year, for example you plan to retire, itemized deductions this year may be more valuable than next year. You may want to pay deductible expenses before year-end. Such things as January mortgage payment, real estate taxes, fourth quarter state income taxes, medical bills, etc. If you’re a candidate for Alternative Minimum Tax, some of these deductions could be disallowed.

6. **Beware of year end mutual fund purchases** – Sometime in December, many funds pay out dividends and capital gains that have built up during the year, and the payout goes to investors who own the shares on what’s known as the ex-dividend date. At the time of the payout, the share price falls by exactly the same amount as the payout. Bottom line you must claim the dividend or capital gain as taxable income even if the money is automatically reinvested in extra shares. (this does not apply to mutual funds inside or 401(k) plans or other tax-deferred retirement accounts) Before you buy shares for a nonretirement account in December, check the fund company’s Web Site to find out exactly when the dividend will be paid.

7. **Income deferral or income acceleration strategies** – A deferral strategy shifts income into a later year. If you think you are going to be in a lower tax bracket next year, try to defer income until next year. Such things as, ask your employer to pay out any bonuses in January, hold off selling investments that are going to produce gain, if possible hold off distributions from retirement accounts until January, etc. Income acceleration strategies shift income to this year instead of next year. Here almost the reverse is true, pay employer bonuses this year, sell investments with gain this year, convert your IRA to a ROTH IRA (see previous comments), etc.

**Financial Planning and Investment Advisory Services offered through Prudential Financial Planning Services, a division of Pruco Securities, LLC. Securities products and services are offered through Pruco Securities, LLC**

Prudential Financial, its affiliates and its financial professionals do not render tax or legal advice. Please consult with your tax and legal advisors regarding your personal circumstances.

0269665-00001-00

---

**Jeffersonian Dinner**

The Foundation Philanthropy Department recently kicked off a series of “Jeffersonian Dinners.” Are you wondering... What is this new event? Well, it’s not really “new” at all. To introduce the concept, I invite you step into a time machine...

Imagine being invited to a dinner in 1819 at Monticello, the elegant Virginia home of Thomas Jefferson—president, scientist, farmer, connoisseur, scholar, and author of the Declaration of Independence. Around his table, you’d encounter some of the leading spirits of the age—men and women steeped in politics, literature, the arts, the sciences, theology, history, mores, and manners—people that Mr. Jefferson invited because he found them, intriguing and delightful to spend a stimulating evening with. And an evening like this was also a prime source of education both for Mr. Jefferson himself and for the guests around the table, all of whom were engaged citizens, eager to share and debate the varied ideas that would shape the fortunes and spur the development of their rapidly-growing young nation. *(From the book “The Generosity Network,” Jennifer McCrea and Jeffrey C. Walker.)*

This is the concept that has inspired the Trustees of the Foundation of the Pennsylvania Medical Society to pursue this event— not with the goal of being a typical fundraiser — but with the goal of building a sense of community and partnership around a shared interest or theme and possibly empowering like-minded individuals who can apply their talents and resources to meet specific challenges that they define.

The evening’s table discussion focuses on a theme. Attendees have the opportunity to engage and share in meaningful discussion to benefit the Foundation. If you are interested in learning more or hosting a dinner, please contact Margie Lamberson at mlamberson@pamedsoc.org.

Thank you Raymond Truex, MD, for hosting our first Jeffersonian dinner.
Physicians’ Health Programs Medical Director Cliff Lyons, MD, spent the summer traveling across Pennsylvania providing outreach to other doctors about how the PHP can help them during life’s most challenging moments. “PHP saved my life, not to mention my career,” he tells different groups. The individuals hearing his message include hospital staffs, medical school students and people belonging to support groups. In fact, Dr. Lyons had one very special attendee this summer -- his father -- Wilbert A. Lyons, MD. The senior doctor is committed to supporting his son and the good work that he does.

Dr. Cliff Lyons visited multiple Caduceus meetings to better understand how the PHP can communicate with attendees. Caduceus is a 12-step recovery meeting geared specifically to physicians and healthcare professionals. He listened to participants’ concerns and brought back real-time feedback to the PHP.

This kind of outreach about the services that PHP offers is supported by generous personal donations and by hospitals in the state. Lyons tells physicians that, “As all doctors know, being a physician is very stressful and can foster maladaptive coping mechanisms. The PHP is a supportive, compassionate and respectful program that offers help when you feel trapped, helpless, or hopeless. It is a safe haven. Your financial support of the program ensures we will be here for the next physician in need.”

Both Dr. Wilbert Lyons and Dr. Cliff Lyons have made personal financial commitments to the PHP because, “healthy recovery means physicians can continue to help other people,” said Dr. Wilbert Lyons. They have gone the extra mile and made legacy gifts meaning they have included a statement in their will clearly expressing their intentions to support the PHP. “This speaks to the endurance of the PHP as an organization,” said Dr. Cliff Lyons. “I have a deep, personal gratitude to PHP and I want to make sure that it is there for the next physician who needs it. A legacy gift is an easy, painless way to pay it forward,” he said.

“I’ve given my support to the PHP endowment fund in honor of the tremendous help it provided for my son,” said Dr. Wilbert Lyons. “In a larger sense, ensuring the tools for recovery means you reach the whole medical community -- doctors, practices, families -- everyone who is touched by the work of a physician.”

A lot of people are surprised to learn that there are ways to support their charitable interests while also providing a stable source of income for themselves or family members. Charitable gift annuities can result in extra income to you or another person of your choice, generate current and future tax savings, and help you make a charitable gift that might not otherwise be possible.

“We are very thankful to the Lyons family,” said Director of Philanthropy Marjorie Lamberson, CFRE. “They have made giving to the Foundation a priority in their life. In fact, Dr. Wilbert Lyons and his wife, Nancy, love the ‘win-win’ of gift annuities so much that they recently completed their fourth gift to the Foundation in support of the PHP,” she said.

What is a charitable gift annuity? It is a simple contract that makes it possible to transfer cash or marketable securities, such as stock, to the Foundation. In exchange, you and another person you designate will receive guaranteed annual income payments for life. Your benefits - in addition to lifetime income - include an immediate federal income tax deduction; payments that are only partially taxed, capital gains tax savings (if funded with appropriate securities), and possible reduced probate costs and estate taxes.

The Foundation expresses its gratitude to all of its legacy donors and their gifts that will support the future good work of the organization.

For more information about how to join our “Foundation Fellows” and to learn more about legacy giving please visit us at www.foundationpamedsoc.org/Philanthropy/GiftPlanning or you may reach Marjorie at 717.558.7846 or mlamberson@pamedsoc.org.

**DISTINGUISHED FELLOWS**

Cliff Lyons, MD, (right) and his father, Wilbert Lyons, MD, on vacation in Florida.

**“HOW DO YOU WANT TO BE REMEMBERED?”**

It’s easy.

You can make a simple, yet transformational gift through your will or estate that costs you nothing during your lifetime.

Please contact Margie Lamberson at 717.558.7846 or mlamberson@pamedsoc.org for more information.

The Foundation of the Pennsylvania Medical Society

Donald E. Parlee, MD, FACR
Vice Chair, Foundation Board of Trustees
We have all heard the term; do you make it your practice? We hope that if you are personally in a position to make the Foundation your charity of choice you will do so today. The Foundation receives support through a number of donors: corporate and hospital support, support from individuals and legacy gifts from those that want to make sure that the programs and services provided by the Foundation will always be available to those who may be in need. We invite you to use the enclosed remittance envelope or go online and make your gift today.

On our website you will also find a variety of information on planning for your future charitable giving and making sure your generosity will support the causes your care most about. Recently posted to the Foundation website www.foundationpamedsoc.org, (click Philanthropy, Gift and Estate planning) are two documents to assist with your retirement financial health. One of these documents speaks to the basics of how to establish a legacy through a – meaning listing the Foundation, or any charity, as a beneficiary in your will. Look for it at the “Bequest” link on our Gift and Estate planning page.

Charitable gift annuities are another very popular planned giving option. You can plan a substantial charitable gift that will allow you, or a person you designate, to receive payments for life or for a set period of time. Assets remaining in this gift plan when the payment period is over will benefit the Foundation. To learn more about this “win/win” please complete the “charitable gift annuity application” on our website and we will provide you with customized proposal or I will be happy to talk to you directly about establishing a gift annuity or any other planned giving option.

I look forward to hearing from you! Please contact me at (717) 558-7846 or mlamberson@pamedsoc.org.

Happy Holidays and thank you so much for your support,

Marjorie M. Lamberson, CFRE

PS: I hope you will consider making your gift, of any size, today! It is not too late to take advantage of 2014 tax benefits and to make sure The Foundation of the Pennsylvania Medical Society finishes the year healthy and strong! You may also consider designating a donor advised fund, IRA charitable rollover or giving through appreciated stocks to the Foundation as an additional gifting option.