

Agenda for Orthopedic & Spine PTC

March 13, 2025 from 4 – 8 pm

Skybox DiamondView Tower, San Diego CA

- 4:00 – 4:30: Registration and Cocktails
- 4:30 – 4:40: Introduction & Latest Trends in Orthopedic Group Transactions and Outlook for 2025
- Gary Herschman, Member, Epstein Becker & Green
- 4:40 – 5:10: Why Orthopedic & Spine Groups Are Pursuing Different Strategic Options
- Moderator: Dana Jacoby, CEO, Vector Medical Group
- Panelists: Alejandro Fernandez, CEO, Synergy Orthopedic Specialists
Mark Getelman, M.D., President, Southern California Orthopedic Institute
Matthew Searles, Senior Managing Director, Merritt Healthcare Advisors
Michael Meneghini, M.D. Indiana Joint Replacement Institute (HOPCo, Naples FL)
- 5:10 – 5:45: How Orthopedic & Spine Groups Are Valued and How to Maximize Practice Value by Getting Your House in Order
- Moderator: Anjana Patel, Member, Epstein Becker & Green
- Panelists: Kieran Higgins, Partner, Citrin Cooperman
Gregory Seigel, Managing Director, Seigel Advisory Services
Rob Swisher, CEO, MedRevenu
- 5:45– 6:00: A New Strategic Option to Consider – ESOPs for Medical Groups
- Moderator: Gary Herschman, Member, Epstein, Becker & Green PC
- Speakers: Robert Goettling, Principal, The Bloom Organization
Michael Bannon, Vice President, CSG Partners
- 6:00 – 6:20: How to “Extricate” from a Hospital PSA or Employment Agreement that is Not “Working Out” to Participate in a Strategic Transaction
- Presenters: Dana Jacoby, Member, Vector Medical Group
Glenn Prives, Member, Epstein, Becker & Green

6:20 – 6:30: Brief Break

6:30 – 6:45: How to Maximize the Value of Your Medical Real Estate

Collin Hart, CEO & Managing Director, ERE Healthcare Real Estate Advisors

6:45 – 6:55: Wealth Planning Strategies to Implement Before a Strategic Transaction

Brad Quick, Partner, President & COO, Vestia Personal Wealth Advisors

6:55 – 7:25: How “Income Repair” and “Second Bite Transactions” Work

Moderator: Dana Jacoby, CEO, Vector Medical Group

Panelists: Andrew Carlson, Director of Growth & Strategy, Growth Orthopedics
David Jacofsky, M.D., CEO, HOPCo
Jeff Friedman, Private Equity Engagement Director, Modernizing Medicine
Robert Goettling, Principal, The Bloom Organization

7:25 – 7:55: Anatomy of a Partnership Transaction: What to Expect at Each Stage

Presenters: Jay Pruzansky, DPM, MBA, Managing Dir., Merritt Healthcare Advisors
Nivedita Patel, Member, Epstein, Becker & Green
Margaret Shanley, Principal, CohnReznick

7:55 – 8:30: Keynote Panel: “Life After Closing” of a Partnership Transaction from the Perspective of Orthopedic Surgeons Who Pursued Different Strategic Options

Moderator: Gary Herschman, Member, Epstein, Becker & Green

Panelists: David Jacofsky, M.D., CEO, HOPCo
Ray Kim, M.D. The Steadman Clinic (Orthopedic Care Partners)
William Pennington, M.D. The Orthopedic Inst. of Wisconsin (Surgery Partners)

8:30: Program Conclusion & Networking Reception *Sponsored by MedCraft*