

# Tribia-Tribune

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## President's Message

Andrew A. Shinar, MD



Dear Colleagues,

I am excited to announce that the SOA's 37th Annual Meeting will be held at The Greenbrier in White Sulphur Springs, West Virginia from July 22 to 25, 2020. The Meeting

will be stimulating as always for all Members, in a stunning setting that the whole family will enjoy.

My partner Greg Polkowski, MD will serve as Program Chair. He is working to ensure that you enjoy learning about orthopaedic advances which you can implement into your everyday practice. I am honored to present my colleague, Greg Mencio, MD as our 2020 Distinguished Southern Orthopaedist. Zach Shinar, MD will offer unique perspectives on saving lives in the ER, and vital information for the spouses on household emergencies. My



wife, Lisa is arranging a fun Spouse and Family Program to complement the academics.

Your family can relax outdoors in the mountain air by the pool, enjoy world-class golf and tennis, try pickleball, take Jeep or bike rides through the forest, or try their hand at fly fishing, white water rafting, sporting clay shooting and climbing the aerial tower. If your family prefers indoor activities, they can enjoy bowling, an escape room, an indoor pool, extensive spa services, shopping and the Bunker Tour. The lavish Dorothy Draper design will

make your every experience unforgettable. Finishing touches include complimentary afternoon tea, and even a casino.

Mark your calendar for a great week at the Greenbrier with the whole family. We look forward to seeing you there!

Sincerely,

Andrew A. Shinar, MD  
President, Southern Orthopaedic Association

## Call for Abstracts

The Southern Orthopaedic Association will hold its next Annual Meeting July 22-25, 2020 at The Greenbrier in White Sulphur Springs, West Virginia. The SOA Annual Meeting is one of the premier meetings for orthopaedists practicing in the South. The Scientific Program will be developed to present timely reviews of practice-related techniques and clinical research findings in orthopaedic surgery through outstanding abstracts. Nationally recognized speakers will also be invited to participate.

We invite you to submit one or more abstracts for the meeting, as this is an excellent oppor-



tunity to present a paper to your peers. The submission deadline is January 13, 2020.

Abstract applications may be submitted online through the SOA's website. Visit us at [www.soaassn.org](http://www.soaassn.org) and click on the "Submit an Abstract" link.

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Southern Orthopaedic Association

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## Meet SOA's New Board Members



### Benjamin A. Alman, MD

Dr. Benjamin Alman is an orthopaedic surgeon at Duke University. He received his medical degree from Jefferson Medical College at Thomas Jefferson University in Pennsylvania. He completed a residency in general surgery at Pennsylvania Hospital, followed by one in orthopaedics (as well as a research fellowship in molecular pathology) at Tufts University/New England Medical Center Hospital in Massachusetts. He then completed a fellowship in pediatric orthopaedic surgery at the Hospital for Sick Children at the University of Toronto.

Dr. Alman became an orthopaedic surgeon because he is fascinated by the mechanics of how joints, bones and muscles work together. His focus is on treating children because it provides him an opportunity to make a difference in their health both now and for the rest of their lives. As he enters the later stages of his career, he has had the privilege of seeing patients who he treated as children come back as adults seeking treatment for their own children.

In his spare time, he enjoys photography, hiking and backpacking.



### E. Lyle Cain, MD

Dr. Cain is board-certified in orthopaedic surgery and subspecialty certified in orthopaedic sports medicine. Dr. Cain's research interest involves the evaluation and prevention of injuries in youth sports, as well as the treatment of adult injuries in the shoulder, elbow and knee, including cartilage and meniscal transplantation.

Dr. Cain is a member of the Board of Directors of the ASMI and the American Baseball Foundation (ABF), where he conducts research, provides community outreach services to youth athletes, and actively educates and trains young orthopaedic surgeons. He has also served on the Board of Directors of the American Orthopaedic Society for Sports Medicine (AOSSM) and holds memberships in the American Academy of Orthopaedic Surgeons, American Medical Association, Alabama State Medical Association, Southern Medical Association, International Cartilage Repair Society and the International Society for Arthroscopy and Knee Surgery.

A native of Birmingham, Dr. Cain graduated from the University of Alabama with bachelor's degree in chemical engineering. He earned his medical degree from the University of Alabama School of Medicine. He completed a general surgery internship at the University of Tennessee in Memphis, followed by a position as chief resident at the University of Tennessee-Campbell Clinic in Memphis. He then completed an orthopaedic sports medicine fellowship with James R. Andrews, MD, and William G. Clancy, Jr., MD, at the American Sports Medicine Institute (ASMI). Following his fellowship training, he was invited to become a member of the Alabama Sports Medicine and Orthopaedic Center and later founded the Andrews Sports Medicine & Orthopaedic Center.

Dr. Cain has enjoyed serving as team physician for the University of Alabama Crimson Tide for the past 19 years, and as medical director for both Jacksonville State University and the University of West Alabama. He is also an orthopaedic consultant for Birmingham-Southern College and the Birmingham Barons, AA affiliate of the Chicago White Sox. Dr. Cain is also a team physician for several high schools and he leads an outreach program through the University of West Alabama, which provides medical services to more than 40 rural, underserved schools in the West Alabama area.

## The SOA

The Southern Orthopaedic Association (SOA) was founded in 1983 for physicians who are engaged in the specialty of orthopaedic and trauma surgery. Its mission is to develop and foster the art and science of medicine in the specialty of orthopaedic and trauma surgery. SOA operates exclusively for charitable, scientific and educational purposes.

## 2020 Calendar of Events

January 13, 2020

Abstract deadline for 2020 Annual Meeting

March 2020

Resident Award Manuscripts Requested

March 2020

2020 Annual Meeting Preliminary Program Mails

April 2020

Abstracts Selected and Notifications Mailed

May 20-23, 2020

Southern at the SEC: 2020 Sports Injury Update

July 22-25, 2020

37th Annual Meeting, White Sulphur Springs, WV



## Welcome New Members

Benjamin A. Alman, MD, Durham, NC  
 Paul M. Balthrop, MD, Savannah, GA  
 Aaron M. Bates, MD, Jacksonville, FL  
 Russell R. Bear, DO, Hanover, MD  
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 Alfred Cook, MD, The Villages, FL  
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 Charles E. Crouse, MD, Morehead, KY  
 Brian Curtin, MD, Charlotte, NC  
 Charles D. Daniels, MD, El Dorado, AR  
 Daniel Dziadosz, MD, St Petersburg, FL  
 Rudy J. Ellis, Jr., MD, Louisville, KY  
 Katherine Faust, MD, New Orleans, LA  
 Logan Fields, MD, Athens, GA  
 Kim A. Foreman, MD, Tyler, TX  
 Kenneth G. Gati, MD, El Dorado, AR  
 Charles Giangarra, MD, Orlando, FL  
 Michael A. Griffey, MD, Rogers, AR  
 Charlie Haberman, PA, Austin, TX  
 Todd M. Hall, MD, Lakeland, FL  
 Jason J. Halvorson, MD, Winston Salem, NC  
 Gregory P. Harvey, MD, Houston, TX  
 Paul Henkel, DO, Kingsport, TN  
 John S. Hruska, MD, Port St. Lucie, FL

James A. Hurt, MD, Jackson, MS  
 Joycelyn M. Johnson, Montgomery, AL  
 Deryk Jones, MD, Jefferson, LA  
 Mark M. Kyanja, MD, Plano, TX  
 Lee A. Kelley, MD, Atlanta, GA  
 Felix M. Kirven, MD, Virginia Beach, VA  
 William Kraus, DO, Hoover, AL  
 Gregory Y. LaChaud, MD, Gainesville, FL  
 Thomas M. Large, MD, Asheville, NC  
 Charles M. Lawrie, MD, St. Louis, MO  
 William Leone, MD, Fort Lauderdale, FL  
 Paul Lichstein, MD, Winston-Salem, NC  
 Douglas Lucas, DO, Fletcher, NC  
 Jeffrey C. Martin, DO, Pikeville, KY  
 Gregg L. Massanelli, MD, El Dorado, AR  
 Edward B. McDonough, MD, Morgantown, WV  
 James McQuillan, MD, Athens, GA  
 Gleb Medvedev, MD, New Orleans, LA  
 Michael J. Morrison, MD, Austell, GA  
 David B. Musante, MD, Durham, NC  
 Jason Nemitz, MD, Fort Myers, FL  
 Jeffrey Nepple, MD, Saint Louis, MO  
 Joseph V. Otten, MD, O Fallon, MO  
 Michael J. Patney, DO, Baton Rouge, LA  
 Lucas J. Pavlovich, MD, Elkins, WV  
 Julio Petilon, MD, Atlanta, GA  
 Frank E. Pollock, MD, Winston-Salem, NC  
 Stephen Rodes, MD, Canton, GA  
 Robert H. Sigmund, MD, Saint Louis, MO

## Upcoming SOA Meetings



**Southern at the SEC:  
 Sports Injury Update 2020**  
 May 20-23, 2020  
 Renaissance Ross Bridge  
 Birmingham, AL



**37th Annual Meeting**  
 July 22-25, 2020  
 The Greenbrier  
 White Sulphur Springs, WV



**38th Annual Meeting**  
 July 21-24, 2021  
 Wild Dunes Resort  
 Daniel Island, SC

Anthony F. Skalak, MD, Greenville, NC  
 Charles M. Spivey, MD, Vidalia, GA  
 Austin V. Stone, MD, PhD, Lexington, KY  
 Lance J. Wehrly, MD, Covington, LA  
 Jessica Woodcock, MD, New Bern, NC

## SOA Education Fund

Please help support the SOA Education Fund with a charitable donation. The SOA established this 501(C)3 tax-exempt fund to provide educational opportunities for young orthopaedists throughout the territory.

The SOA provides more than \$12,000 in research grants for residents at its Annual Meeting, which contributions from Members has helped to make possible. These resident research grants will continue to be a focus for the SOA.

We encourage you to make your mark on the future with a donation to help the SOA achieve its goals for funding educational programs for residents. We appreciate your continued support of the SOA's Education Fund, and would like to thank you for your generosity this past year. If you are interested in donating, visit [www.soaassn.org/donate](http://www.soaassn.org/donate).

## Recap of the 36th Annual Meeting

The 36th Annual Meeting was a tremendous success, with an outstanding Scientific Program put together by Program Chair, Dr. Stephen Duncan along with the SOA Program Committee.

Program highlights included Presidential Guest Speaker, Dr. David Kirschman's thought-provoking presentation, "Physician Entrepreneurship: From Operating Room to Board Room." Additionally, Distinguished Southern Orthopaedist and SOA Past-President Dr. James A. Nunley II gave an educational talk titled, "Advances in the Treatment of Ankle Arthritis: Where are We Now?" and Dr. Ryan M. Nunley gave a memorable Presidential Address, "Family Affair." Round Table Discussions were again a very popular feature in the afternoons. In addition to the exception-

al Scientific Program, there was a Resident Review Course, a Women in Orthopaedics Forum, E-Poster presentations and multimedia sessions.

The Meeting kicked off with the always entertaining Welcome Dinner overlooking the Atlantic Ocean at sunset. Everyone had a great time visiting with old friends and new. The following evening began with the Exhibitor Reception, after which everyone had the opportunity to enjoy beautiful Amelia Island or to just relax at the hotel. The Meeting was brought to a close with Grilling and Games, a fun-filled event for the entire family. Spouse Hospitality included a breakfast every morning with special events where guests encountered reptiles, learned the history of nearby Fort Clinch from a Civil War re-enactor /



historian and made hygiene kits to donate to women's shelters.

It was a wonderful Meeting, and we express our thanks to all who attended. If you missed it, view some photo highlights from Amelia Island at [www.soaasn.org](http://www.soaasn.org).

We look forward to seeing you next year at The Greenbrier in White Sulphur Springs, West Virginia, July 22-25, 2020!

## 2019 Poster Awards

### 1st Place Poster Award

Jacob M. Wilson, MD, Emory University  
General vs. Spinal Anesthesia for Revision  
Total Knee Arthroplasty: Do Complication  
Rates Differ?

### 2nd Place Poster Award

Suresh K. Nayar, MD, Johns Hopkins Hospital  
Misvaluation of Shoulder and Elbow Surgery  
Across Payment, wRVU, and Operative Time

### 3rd Place Poster Award

Dennis Chen, MD \* Presented by Nicole D.  
Quinlan, MD, MS, University of Virginia  
Health System  
Normal Pressure Hydrocephalus Increases  
Risk of Post Operative Complications follow-  
ing THA

## Thank You Southern at the SEC Symposium Exhibitors

The Southern Orthopaedic Association would like to thank the grantors and exhibitors of Southern at the SEC: 2019 Sports Injury Update. Without the unrestricted educational support of the companies listed below, we would not have been able to provide this conference.

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## Thank You Annual Meeting Exhibitors

The Southern Orthopaedic Association would like to thank the grantors and exhibitors of the Southern Orthopaedic Association's 36th Annual Meeting. Without the unrestricted educational support of the companies listed below, we would not have been able to provide this conference.

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VirtaMed  
ZipLine Medical, Inc.



## 2019 Year-End Tax Tips

Carole C. Foos, CPA and David Mandell, JD, MBA

Although many of you have just completed and filed your 2018 tax returns, it is already time to take steps to reduce your 2019 tax bill. Since 2018 was the first year that most provisions of the Tax Cuts and Jobs Act (TCJA) were in effect, hopefully you have a better understanding of how the new tax law impacted you and will continue to affect you for the 2019 tax year and beyond.

### Tax Deductions: Choosing Between Standard and Itemized

One of the biggest changes for 2018 individual filers was the reduced state and local income tax deduction which is now capped at \$10,000. This change along with the increased standard deduction led to many filers not itemizing deductions in 2018. If there is a chance that you won't itemize deductions in 2019 and will instead claim the standard deduction of \$24,400 for married taxpayers filing jointly or \$12,200 for single filers, consider the impact of this decision on other deductions.

Charitable contributions are only deductible to taxpayers who itemize. You may want to consider "bunching" your charitable contributions to take full advantage in years when you will itemize deductions. Donor advised funds may be a consideration for taxpayers who want to make a larger contribution in a given year but still have the charities benefit over several years. Also take a look at your mortgage if you will no longer itemize. Since interest rates are still low, you can likely still earn more by investing assets in the market than what you are paying in mortgage interest, even if you don't get a tax deduction for the mortgage interest.

### Possible Double Deduction for Practice Owners

Many of you found out the hard way that your pass-through business did not qualify for the new Section 199A Qualified Business Income (QBI) deduction. Owners of medical practices whose individual taxable income was above certain threshold amounts were ineligible for the deduction since their business is a specified service trade or business. Depending on how close your income was to those threshold amounts, you may be able to reduce your income below the threshold by implementing a qualified retirement plan (QRP) or enhancing your current QRP. This can result in not only a deduction for the contribution to the QRP but also the 20% QBI deduction.

The combination of the two deductions often pays for much of the QRP cost.

The final regulations for Section 199A did contain an example in which an outpatient surgery center was not a specified service trade or business. In the example, no physicians, nurses or medical assistants were employed by the surgery center, and patients were only billed a facility fee by the surgery center. If you feel that your surgery center might fit this example, discuss with your CPA whether you can take the QBI deduction this year or whether there are steps your surgery center can take to become eligible for the deduction.

### Is Your Investment Portfolio Designed for Tax Savings?

Your investment portfolio provides ample opportunities for tax planning. Having a tax efficient portfolio can save you thousands of dollars in taxes over the years. Consider the timing of sales; a holding period of greater than 12 months allows you to pay long term capital gains rates on the realized gain from a sale with a maximum rate of 20% vs. a maximum rate of 37% on an investment which was held for less than a year. Be proactive in realizing losses to offset capital gains and vice versa. A temporary dip in the stock market may be the time to realize some losses that can be used to offset capital gains. If you find that you have net realized losses this year, sell some of the investments that have had tremendous gains over the past few years and re-purchase them at their higher price in order to both offset your losses and increase your basis in the stocks you currently hold.

It is also a good time to evaluate which stocks you hold in which accounts. Brokerage accounts, Roth IRAs, and qualified plans are subject to various forms of taxation. It is important to utilize the tax advantages of these tools to ensure they work for you in the most productive manner possible. Investment vehicles paying qualified dividends are preferred in a brokerage account, while it is generally preferable for qualified accounts to own high yield bonds and corporate debt taxed at ordinary income rates. Have a discussion with your investment advisor to make sure your portfolio is properly positioned for tax efficiency.

### Estate Planning Considerations

You may also want to think about your estate planning as the year draws to a close. The TCJA made the federal estate tax exemption \$22.8 million for a married couple in 2019, but that exemption amount is due to sunset at the end of 2025. Before then, it might make sense to transfer some of your wealth to a trust for the benefit of your heirs. Assets that you know you won't need in your lifetime can thus be protected against future estate tax increases and exemption reductions.

As Benjamin Franklin said, "Failing to plan is planning to fail." Act now to protect your wealth and utilize tax savings opportunities in 2019. The authors welcome your questions.

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David B. Mandell, JD, MBA, is an attorney, consultant and author of more than a dozen books for doctors, including Wealth Protection Planning for Orthopaedic Surgeons. He is a partner in the wealth management firm OJM Group ([www.ojmgroup.com](http://www.ojmgroup.com)), where Carole C. Foos, CPA, is also a partner and lead tax consultant. They can be reached at 877-656-4362 or [mandell@ojmgroup.com](mailto:mandell@ojmgroup.com).

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# *Save the Date*

37th Annual Meeting

July 22-25, 2020

The Greenbrier

White Sulphur Springs, WV

