

American College of Emergency Physicians  
**Exploring Retirement Section Meeting**

*ACEP25*

September 8, 2025  
MINUTES

PENDING - THESE MINUTES WERE APPROVED BY THE SECTION CHAIR AND ARE  
PENDING APPROVAL BY THE EXPLORING RETIREMENT SECTION AT THE  
ACEP26 MEETING. ANY CHANGES WILL APPEAR IN THE MINUTES OF THAT MEETING.

## **Participants**

Section members participating for all or part of the meeting included: Stephen Anderson, chair; Fred Dennis, vice chair; Others included on the attached sign-in sheet.

Others participating in all or part of the meeting included: Leelyn Smith representatives, Kevin Predengast, Chris McNama, and Molly Evans; Others included on the attached sign-in -sheet; Sandra M. Schneider, ACEP staff liaison; Julie Wassom, ACEP staff.

## **Agenda**

Brunch - Sponsored by the Emergency Medicine Foundation (EMF)

EMF Overview - Tony Velluci

Call to Order / Welcome

Report on Council Resolutions / Actions

Mentoring / Coaching Panel Discussion

Break / Good of the Order / Elections for Secretary/News Editor, Councillor, and Alternate Councillor

More Than a 401(k): Advanced Tax and Wealth Strategies for Emergency Physicians Planning for Retirement

Navigating Insurance into Retirement - Panel Discussion

## **Major Points Discussed**

Dr. Anderson welcomed everyone and thanked the sponsors of the section meeting, the Emergency Medicine Foundation (EMF) and Leelyn Smith, LLC. He then asked Tony Velluci to provide an overview of EMF and ways that sections members could be involved in supporting the foundation.

Following Tony's presentation, Dr. Pattavina provided a report about the recent Council meeting, along with the results on the resolutions and Board, Council, and presidential elections.

There was a panel discussion on mentoring and coaching, led by Dr. Amanda Irish, Dr. RJ Sontag, and Dr. Nick Cozzi. The three panelists emphasized the following points:

- Casual mentor relationships are the best.
- Kindness matters.
- Make yourself relatable to younger physicians. Introduce yourself. Offer time. Share lessons learned.

- Encourage younger physicians to have a professional plan but hold it loosely and be open to other opportunities. Share those opportunities with younger physicians.

Following the panel discussion, elections for section officers were held. The new officers for 2025-26 are:

- Secretary/News Editor - Dr. Thomas Benzoni
- Councillor - Dr. Jay Kaplan
- Alternate Councillor – those interested in this position should reach out directly to Dr. Anderson.

Kevin Predergast from Leelyn Smith, LLC, then gave a presentation on tax and wealth strategies for emergency physicians planning for retirement. Questions from the audience were answered, and those with additional questions were encouraged to reach out to Chris McManama at [cmcmanama@leelynsmith.com](mailto:cmcmanama@leelynsmith.com).

Following the Leelyn Smith presentation, Dr. Anderson led a brief discussion on navigating insurance in the retirement years, addressing issues related to malpractice insurance, health insurance, long term care insurance, home and auto insurance, disability insurance, life insurance, and pet insurance.

With no more business to discuss, the meeting was adjourned.

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