



Wharton  **Health Care**  
Business Conference

February 19-20, 2004  
Park Hyatt at the Bellevue  
Philadelphia, PA



Dynamic Visions. Compelling Strategies.

w e l c o m e

## Welcome From The Dean

It is a pleasure to welcome you to the 9<sup>th</sup> Annual Wharton Health Care Business Conference. Organized entirely by Wharton MBA students, the conference showcases the Wharton School's longstanding commitment to advancing business practice in this critical industry. This year's conference occurs at a pivotal moment when innovation and regulation are prompting dramatic changes across the entire health care industry. Wharton is proud to be part of this industry transformation, both through the leadership of our alumni working in health care and our world-class academic and research activities in the field.

I am thrilled with the caliber of speakers at this year's conference and am grateful for their willingness to share their knowledge and insights with students, alumni and friends of the Wharton Health Care Program. This event offers a unique opportunity for business leaders across the various sectors of the health care industry to interact with students and academic experts in a discussion of the trends that will affect the direction of the industry. This open forum also serves as an opportunity for cross-sector learning and exploration of how leading companies can maintain their drive toward further growth.



Thanks again to the many keynote speakers, moderators, panelists and sponsors who have partnered with our students to make this conference a keystone event for Wharton this and every year. I hope you all enjoy your time at the conference and that you take away new knowledge for still greater achievements in the future.

Sincerely,

A handwritten signature in black ink that reads "Pat Harker". The signature is written in a cursive, flowing style.

Patrick T. Harker  
Dean  
The Wharton School

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## Welcome From The Co-Chairs

Welcome to the 9<sup>th</sup> Annual Wharton Health Care Business Conference. We are excited to have you as our guest!

Health care is one of the most dynamic and rapidly growing industries in the US economy today. Because of these characteristics and the tremendous diversity of its stakeholders, the health care industry generates a host of business, political, and social issues that are worthy of debate. As such, the mission of The Wharton Health Care Business Conference is to be the leading forum for industry professionals, academics, and students to meet and discuss the critical challenges and opportunities for health care businesses.

We'd like to extend our sincere thanks to the sponsors for their generous support of this year's conference, which would not be possible without them. In addition, we are grateful to our keynote speakers, moderators, and panelists, who have generously donated their time and effort to help create today's program. Their participation ensures that the conference will continue to be the pre-eminent academic forum devoted to the health care industry.

We also thank the team of more than forty student volunteers who worked tirelessly to help organize this year's conference. The event is entirely student-run, and the tremendous energy of these Wharton MBA students is essential to its success. We also thank our Conference Advisory Board, the Wharton Healthcare Alumni Association, and the previous conference co-chairs for their guidance and support in developing the conference program.

Finally, we acknowledge the generosity of the Wharton Health Care Department and the special efforts of June Kinney, who provided valuable advice throughout the development of the conference, and Christine Aleszczyk and Rosalie Natale, who provided administrative support.

We hope you will participate fully in the conference, and that it will be a pleasant and rewarding experience.

Sincerely,

**Tiffany Bray**  
Co-Chair

**Erika Greenfest**  
Co-Chair

**Howard Horn**  
Co-Chair

## February 19, 2004

### The Wharton School, Jon M. Huntsman Hall, Room G06

5:00-6:00pm      Opening Keynote Address  
Joseph Scodari, Company Group Chairman of Biopharmaceuticals  
Johnson & Johnson

## February 20, 2004

### Park Hyatt at the Bellevue

8:00-8:50am      Registration and Networking Breakfast (Grand Ballroom Foyer, 1<sup>st</sup> Floor)

8:50-9:00am      Welcome Comments (Grand Ballroom, 1<sup>st</sup> Floor)

9:00-10:00am      Morning Keynote  
Dr. Stephen Oesterle, Senior Vice President for Medicine and Technology  
Medtronic, Inc. (Grand Ballroom, 1<sup>st</sup> Floor)

10:00-10:15am      Break

10:15-11:30am      - Pharmaceutical Panel: *Effective Corporate Merger and Acquisition Strategies: Is Bigger Always Better?* (Rose Garden Room, 19<sup>th</sup> Floor)  
- Payor/Provider Panel: *Where Do We Go From Here: Perspectives on Improving the US Health Care System* (Red & Clover Room, 1<sup>st</sup> Floor)

11:30-12:45pm      Networking Lunch (Grand Ballroom, 1<sup>st</sup> Floor)  
- Wharton Healthcare Alumni Achievement Award Presentation

1:00-2:15pm      - Medical Device Panel: *Can the Current Growth of the Medical Device Industry be Sustained?* (Rose Garden Room, 19<sup>th</sup> Floor)  
- Entrepreneurship Panel: *From Idea to Implementation: The Company Creation Process* (Red & Clover Room, 1<sup>st</sup> Floor)

2:15-2:30pm      Break

2:30-3:45pm      - Biotech Panel: *From Partners to Platforms to Products: How will Successful Biotechs Play the Game?* (Red & Clover Room, 1<sup>st</sup> Floor)  
- Finance Panel: *The Quest for the Perfect Deal* (Rose Garden Room, 19<sup>th</sup> Floor)

4:00-5:00pm      Closing Keynote (Grand Ballroom, 1<sup>st</sup> Floor)

5:00-6:00pm      Cocktail Reception (State Drawing Room, 1<sup>st</sup> Floor)

## Keynote Speakers



### **Dr. Stephen Oesterle**

Senior Vice President for Medicine and Technology  
Medtronic, Inc.

Stephen N. Oesterle, M.D., joined the company in January 2002, after serving as Associate Professor of Medicine at the Harvard University Medical School and Director of Invasive Cardiology Services at Massachusetts General Hospital, Boston. In his new position as Senior Vice President for Medicine and Technology, Dr. Oesterle provides executive leadership for Medtronic scientific research, formation of technological strategies and continued development of strong cooperative relationships with the world's medical communities.

A world-recognized clinician, teacher and innovator in the field of cardiac catheterization, Dr. Oesterle developed and directed interventional cardiology programs at Good Samaritan Hospital, Los Angeles from 1986 to 1991; at Georgetown University in 1991 and 1992 and at Stanford University from 1992-98.

While at Stanford, Dr. Oesterle established the University Medical Center's first endovascular device laboratory. Subsequently, he founded a similar medical device development laboratory at Massachusetts General Hospital where he and his colleagues sought unique, minimally invasive methods for treating coronary disease, valvular disease, rhythm disturbances and heart failure.

Dr. Oesterle has been an advisor and consultant to medical device companies, financial institutions and Internet service providers. He has international experience in clinical research and has trained many physicians in interventional cardiology, traveling widely to teach and demonstrate modern techniques in Europe and Asia. A scholarship fund he developed for Stanford and Massachusetts General Hospital is dedicated toward the training of cardiologists from less-developed countries. He has made more than 200 invited presentations to regional, national, or international medical symposia and workshops.

Dr. Oesterle was born March 3, 1951 in LaGrande, OR. He is a 1973 summa cum laude graduate of Harvard College and received his medical doctorate from Yale University in 1977. His internship and residency years were at Massachusetts General Hospital from 1977-80 and he served a fellowship in interventional cardiology at Stanford from 1981 to 1983.



### **Joseph Scodari**

Company Group Chairman of Biopharmaceuticals  
Johnson & Johnson

Joseph C. Scodari is a company group chairman of Johnson & Johnson. He has responsibility for the biopharmaceutical businesses, including all commercial business units of Centocor, Ortho Biotech, and Scios. He also co-chairs the Pharmaceutical Group's U.S. President's Council. Mr. Scodari assumed his new responsibilities in March, 2003.

Previously, he was a company group chairman since March, 2001, with responsibility for Janssen Pharmaceutica, U.S.; Janssen-Ortho Inc., Canada; Ortho-McNeil Pharmaceutical, U.S.; the Global Pharmaceutical Communications functions, and the Pharmaceuticals Sourcing Group Americas. He was also a member of the Pharmaceuticals Group Operating Committee.

Mr. Scodari joined the Corporation in October 1999, with the completion of the merger of Johnson & Johnson and Centocor, Inc. Mr. Scodari originally joined Centocor in 1996 as executive vice president and president of the pharmaceutical division. In 1997 he was appointed president and chief operating officer and a member of the Centocor Board of Directors.

Prior to joining Centocor, Mr. Scodari held positions with Sterling Drug and Rhône-Poulenc Rorer Pharmaceuticals (RPR), where he most recently served as senior vice president and general manager, The Americas.

Born in Youngstown, Ohio, Mr. Scodari received a bachelor of arts degree from Youngstown State University. He serves on the board of BIO (Biotechnology Industry Organization), and the Board of Overseers of the University of Medicine & Dentistry of New Jersey, Robert Wood Johnson Medical School. He has previously served on the board of directors of Pharmacyclics, Inc., on the board of The Epilepsy Foundation of America, and the board of trustees of the University of the Sciences in Philadelphia. Mr. Scodari is also a past chairman of the Associate Member Board of the National Wholesale Druggists Association.

Mr. Scodari resides in Pennsylvania with his wife.

## Panel Discussions: BIOTECH PANEL

### M o d e r a t o r

**Rodney W. Zimmel**  
Principal  
McKinsey & Company



Rodney Zimmel is a Principal in the New York office of McKinsey & Company. He is part of the leadership group of the Pharmaceuticals and Medical Products practice, and helps lead the firm's knowledge development in the area of R&D. His experience includes engagements with leading pharmaceutical, medical device, and diagnostic companies. Rodney's expertise has included a major R&D productivity improvement program, product launch strategies, and M&A opportunity assessments. His experience also spans the wider health care community including genomics companies, pharmaceutical benefit management (PBM) firms, and a major charitable research foundation.

Rodney joined McKinsey & Company in London in October 1995, moved to the New York office in May 1997 and was elected partner in January 2001. Previously he obtained a Ph.D. in Molecular Biology and a first class BA/MA degree in Natural Sciences, both from Trinity College Cambridge, UK. He also worked for a retail pharmacy chain in the UK. Rodney serves on the international board of the Juvenile Diabetes Research Foundation and chairs their management advisory committee.

### **From Partners to Platforms to Products: How will Successful Biotechs Play the Game?**

Just three years into the 21<sup>st</sup> century, the biotechnology industry has already witnessed significant changes to its approach to creating therapeutics. The biotechnology panel will discuss these changes and explore which segments of the drug development process will be the most successful for firms both big and small. Additional topics to be covered include:

- Whether or not pure platform companies are a fad of the past
- The emergence and future prospects of hybrid platform/product companies
- The prospects for fully integrated biopharmaceutical firms
- Recent trends in product licensing and corporate partnerships

**Mark Augustine**  
Managing Director  
Credit Suisse First Bank



Mark Augustine is the Managing Director of the Biotech Equity Research Group at CSFB. He previously worked as a biotechnology analyst at U.S. Bancorp Piper Jaffray and SG Cowen. Mr. Augustine has also worked at Morgan Stanley and Canaan Partners, a venture capital firm.

Mr. Augustine received a B.A. from Yale College and an MBA from Harvard Business School.

**Keith Dionne, Ph.D.**  
Vice President and General  
Manager, Technology Business  
Millennium Pharmaceuticals, Inc.



Dr. Dionne is Vice President, R&D Strategy responsible for portfolio product development at Millennium Pharmaceuticals. Previously, Dr. Dionne was General Manager of Millennium's Technology Solutions Business where he built Millennium's technology platform through external technology acquisition and collaborations. He has also held a number of other roles at Millennium including head of technology program management and strategic technology alliances.

Prior to Millennium, Dr. Dionne led the development of the Duros™ family of implantable drug delivery systems at ALZA Pharmaceuticals including Viadur™, a 12-month implant for treating prostate cancer. Additionally, he was one of the original scientists at CytoTherapeutics Inc., where he led the diabetes encapsulation program.

Dr. Dionne has been an Adjunct Professor in the Biomedical Department at Brown University and received his Ph.D. in Chemical Engineering and his M.S. in the Program for Technology Policy at the Massachusetts Institute of Technology where he was a Hertz and NSF Fellow.

## Panel Discussions: **BIOTECH PANEL**

### **Donald L. Drakeman, J.D., Ph.D.**

President and CEO  
Medarex



Donald is the co-founder, President and CEO of Medarex, a Nasdaq-listed biotechnology company developing monoclonal antibodies for the treatment of a wide range of life threatening and debilitating diseases. Previously, he served as Vice President of Essex Chemical Corporation, an NYSE-listed company, where he was responsible for several biomedical ventures. Additionally, Donald served as an attorney at the international firm of Milbank, Tweed, Hadley & McCloy and as a faculty member at Princeton University, where he has taught in the areas of constitutional law and civil liberties. He has also served as Chairman of the Biotechnology Council of New Jersey and on the boards of a number of international biotech firms as well as the Biotechnology Industry Organization.

Donald received an A.B. degree, *magna cum laude*, from Dartmouth College; a J.D. degree from Columbia Law School, where he was a Harlan Fiske Stone Scholar; and a Ph.D. in Religion from Princeton University. He is a trustee of Drew University and the Woodrow Wilson National Fellowship Foundation.

### **Andrew Gengos**

Vice President,  
Strategy and Corporate Development  
Amgen



Andrew has extensive biopharmaceutical experience and currently serves as Vice President of Strategy and Corporate Development at Amgen. Prior to Amgen, Andrew was Vice President, Chief Financial Officer, and Chief Business Officer for Dynavax, a private stage biopharmaceutical company focused on products to treat allergies, infectious diseases, cancer and chronic inflammatory disease. Additionally, Mr. Gengos served as Vice President of Strategy and Corporate Development for Chiron, a Biopharmaceutical company with a strategic focus on cancer and infectious diseases, and spent six years with McKinsey & Company in Los Angeles working on healthcare-related projects.

Andrew received his bachelor's degree in chemical engineering from the Massachusetts Institute of Technology and his master's of business administration from the Anderson Graduate School of Business at the University of California, Los Angeles.

## Panel Discussions: **BIOTECH PANEL**

### **Dr. Vanessa King**

Vice President, External Development & Collaborations  
The Center for the Advancement of Genomics

Vanessa King heads External Development & Collaborations at The Center for the Advancement of Genomics (TCAG), an organization founded to advance human genomics research and policy. Her responsibilities include identifying, structuring and executing collaborations and other external relationships, in areas ranging from the application of genomic science to human health, energy and the environment (through TCAG's sister organization the Institute for Biological Energy Alternatives) to the development of new technologies for sequencing and other types of genomic and proteomic analysis. She also manages TCAG's partnerships in genomic medicine with Duke University and the University of San Diego.

Vanessa brings a broad range of experience in the life sciences industry to her current role. Prior to this, she was the Vice President, Business Development & Strategy for PerkinElmer's \$1 billion Life and Analytical Sciences business. In this role, she drove the acquisition and venture strategy globally for reagents, consumables and equipment; managed a broad pipeline of deals ranging from licensing to acquisition; and led the strategic planning process to set market orientation, product development and investment priorities across genomics, proteomics, cellular science, informatics, and molecular diagnostics markets.

Prior to joining PerkinElmer, Vanessa worked as a consultant for McKinsey & Co. where she focused on strategy development, M&A, and organizational performance work for pharmaceutical, biotech and other technology clients. Vanessa obtained her Ph.D. in Molecular Genetics from Trinity College, Cambridge, UK and her A.B. Phi Beta Kappa from Princeton University.

### **Dr. Dirk Lammerts**

Vice President, Business Development  
Affymetrix



Dr. Dirk Lammerts is Vice President Business Development at Affymetrix, a Santa Clara, California based firm which is the leading manufacturer of DNA microarrays for pharmaceutical, biotechnology, diagnostic, and industrial products companies, as well as research institutions. Dirk is responsible for business development and commercial activities within Affymetrix' Clinical Genomics business. Prior to joining Affymetrix, he worked in McKinsey & Company's pharmaceuticals and medical products practice.

A physician by training, Dirk earned his M.D. from the Medical School at Duesseldorf University in Germany.

### **Kenneth I. Moch**

President and CEO  
Alteon



Kenneth I. Moch was appointed President & CEO and a member of the Board of Directors of Alteon Inc. in December 1998, and was elected Chairman in June 2001. Mr. Moch joined Alteon in February 1995 as Senior Vice President, Finance and Business Development & CFO. From 1990 to 1995, Mr. Moch served as President & CEO of Biocyte Corporation, a pioneer in umbilical cord blood stem cell collection and transplantation. Previously, he was the Managing General Partner of Catalyst Ventures (a seed stage venture fund), a co-founder and Vice President of The Liposome Company (a cancer and infectious diseases company), and a management consultant with McKinsey & Company and Channing, Weinberg & Company/The Wilkerson Group.

Taking a strong regional focus towards biotechnology, Mr. Moch currently serves as Vice Chairman of the Biotechnology Council of New Jersey (BCNJ), as a member of the Executive Committee of the New York Biotechnology Association (NYBA), and as a member of the Governing Body of the Emerging Companies Section of the Biotechnology Industry Organization (BIO). He is a Founding Fellow of The Biotechnology Study Center at New York University School of Medicine.

Mr. Moch received his A.B. in biochemistry from Princeton University and an MBA from the Stanford Graduate School of Business.

### **From Idea to Implementation: The Company Creation Process**

While each year thousands of individuals set out on their own to launch a business, ultimately only about 1 out of 10 of these start-ups ever succeed. During this panel, you will hear from successful entrepreneurs who will tell you about their own experiences in the company creation process within the health care industry. Specific areas of focus include:

- Idea creation and effective patent strategies
- Funding methods including a discussion of how to select the right venture capital firm
- Building an effective management team and top tier board for each stage of corporate growth
- Successfully managing corporate set-backs
- Proven exit strategies and when to employ them



## Panel Discussions: **ENTREPRENEURSHIP PANEL**

**M o d e r a t o r**

**Jay Moorin**  
Partner  
ProQuest

Mr. Moorin has been a General Partner of ProQuest since its founding in 1998 and has since led ProQuest's investments in U.S. Bioscience, Epic Therapeutics, and Pharmion. He also currently serves on the Board of Directors of ACMI, Acurian, Guava Technologies, Novacea, and Pharmion.

Prior to joining ProQuest, Mr. Moorin served as Chairman, President and Chief Executive Officer of Magainin Pharmaceuticals, Inc. (now Genaera Corp.), where he raised over \$150 million in private and public capital, oversaw the development of a new therapy from initial discovery through clinical research to regulatory submission, and forged collaborations with leading pharmaceutical companies such as SmithKline Beecham and Sandoz. Jay also served as Managing Director, Health Care Banking at Bear, Stearns & Co., Inc., where he managed one of the first biotech mergers, privatized a specialty pharmaceutical firm, and closed one of the first PIPE financings for a biotech company. In 1983, he joined E.R. Squibb and Sons Pharmaceuticals, Inc., where he held positions in marketing, strategy and general management, eventually serving as Vice President of Marketing and Business Development in the SquibbMark Division.

In 1996, Mr. Moorin was appointed to the position of Adjunct Senior Fellow of the Leonard Davis Institute of Health Economics at the University of Pennsylvania. He holds a B.A. with distinction in economics from the University of Michigan.

### **David R. Guyer, M.D.**

CEO, Co-founder,  
Member of the Board of Directors  
Eyeteck

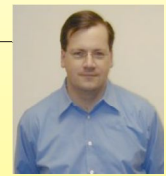


Dr. Guyer has been CEO of Eyeteck since its inception in 2000. Eyeteck raised \$108.5 million in its last private round and recently announced a \$745 million plus development costs deal with Pfizer to co-develop and commercialize their lead product for Macular Degeneration and Diabetic Retinopathy.

Author of over 100 publications, Dr. Guyer is an internationally recognized authority on macular diseases, particularly the use of anti-angiogenic drugs for treating AMD and DME. After directing the residency program at Manhattan Eye, Ear and Throat Hospital, he became Professor and Chairman of the Ophthalmology Department at the New York University School of Medicine. Dr. Guyer was the Study Co-chairman of the Pharmacological Therapy for Macular Degeneration Study Group. He has served as a consultant on ophthalmic products to more than twelve different pharmaceutical companies, as well as Chairman of the Research Committee of the Macula Society - one of the most renowned societies of retinal specialists in the world. He received his M.D. from the Johns Hopkins University School of Medicine and his undergraduate degree from Yale College.

### **Michael J. Luby**

President and CEO  
TargetRx



Michael co-founded TargetRx in December 1999 and as President, CEO, and a member of the Board of Directors, he has led the company in the completion of over \$30 million in financing transactions. Prior to founding TargetRx, Mike spent 10 years in sales and marketing at Merck & Co., Inc. where he had assignments crossing the entire product lifecycle, most recently serving as Senior Director of Marketing, Worldwide for New Products. He also served as Director of New Product Marketing for Merck where he managed the marketing of early stage development candidates and evaluated the marketing potential of in-licensing drug candidates from biotech companies and academic centers. Prior to that assignment, he served as Senior Marketing Manager for Fosamax, as a market research analyst on Vasotec and Prilosec, and also completed marketing assignments that focused on marketing to managed care customers, including an assignment at Merck-Medco Managed Care.

Mike holds a B.A. in economics from Dartmouth College and an MBA from the Wharton School of the University of Pennsylvania.

## Panel Discussions: **ENTREPRENEURSHIP PANEL**

**Eric Meier**  
President and CEO  
Calypso Medical



Eric currently serves as President & CEO of Calypso Medical. Prior to its founding, Eric was Executive Director with Ethicon Endo-Surgery, a Johnson & Johnson company, responsible for business development and marketing and Director of Business Development at Ethicon, another Johnson & Johnson company. Prior to Johnson & Johnson, he led several research and development programs at Protocol Systems, a medical device company, including drug delivery and patient monitoring systems. Eric currently serves on the board of Polhemus Inc., a Kaiser Aerospace Corporation, and Ziba Design, an industrial design firm.

Eric earned an MBA from Stanford University focused in the areas of marketing and manufacturing and a BSE in Biomedical Engineering from Duke University.

**David I. Scheer**  
President  
Scheer & Company, Inc.



As President of Scheer & Company, Inc., a firm with over twenty years of life science expertise in venture capital, corporate strategy, and transactional advisory services, David has helped found ViroPharma, Inc., OraPharma, Inc., Esperion Therapeutics, Inc., Achillion Pharmaceuticals, Inc., and Sopherion Therapeutics, Inc. He currently serves as acting CEO and Chairman of Tengion, Incorporated, a startup company involved in the engineering of organs and tissues for therapeutic applications. David has also led engagement teams in providing corporate strategic advisory services to clients including Agouron Pharmaceuticals (now a Division of Pfizer), American Cyanamid (now a Division of American Home Products), Pharmacia AB, Pharmacia & Upjohn, Hoffmann La-Roche, Eli Lilly, Johnson & Johnson, and Bristol-Myers Squibbs. From 1991 through 1999, he was an advisor to Oak Investment Partners, in connection with their health care investment program.

Mr. Scheer is also a member of the Advisory Board for the BioSeed Fund for the State of Connecticut, as well as a member of the Advisory Board for the Harvard Malaria Initiative. He received his A.B. cum laude from Harvard College and an M.S. from Yale University.

**Dr. Robert Zerbe**  
CEO  
QUATRx Pharmaceuticals



Dr. Zerbe currently serves as the CEO of QUATRx Pharmaceuticals. Prior to founding QUATRx, Dr. Zerbe was Senior Vice President of Worldwide Clinical Research and Development at Parke-Davis where he oversaw the successful development programs for Lipitor®, Neurontin® and other key products. Additionally, Dr. Zerbe has also had extensive experience in regulatory affairs and global clinical development through his work at Eli Lilly (US & UK), where he held a variety of R&D positions including Managing Director, Lilly Research Center U.K, and V.P. Clinical Investigation and Regulatory Affairs.

Dr. Zerbe is a physician trained at Indiana University and has post graduate training in internal medicine, endocrinology, and neuroendocrinology at Indiana and the National Institutes of Mental Health.

### ***The Quest for the Perfect Deal***

As one of today's hottest areas for investment, the health care industry offers many attractive opportunities for those who have a detailed understanding of its business drivers. This panel is designed to provide an overview of effective health care investing strategies utilized by the industry's leading investment authorities. Topics to be covered include:

- Current trends in health care investing and what they tell us about the financial climate going forward
- What segments present the best investment opportunities
- What strategies are driving the best health care deals today

## Panel Discussions: **FINANCE PANEL**



### **M o d e r a t o r**

#### **Peter Baird**

Principal  
McKinsey & Company

Peter Baird is a Principal in McKinsey's New Jersey Office. During his 6 years with the firm, Peter has led or participated in engagements covering a broad range of strategic and operational issues, focusing particularly on specialty pharmaceutical companies and private-equity firms. He also has extensive experience in transactional situations, including M&A, alliances and joint ventures. He left McKinsey in 1997 to work as a partner at a South African private equity firm, focusing on health care investing, but rejoined the firm in 1999. Peter has also worked in the mergers and acquisitions department of Lehman Brothers in New York, and as a lecturer in economics at the University of Cape Town.

Peter has an MBA from Stanford Business School, which was awarded with high distinction (Arjay Miller Scholar). He also holds a Master's degree in Economics from the University of Cape Town, and a B.A. in Economics from Bates College. Peter is a Chartered Financial Analyst.

#### **Peter N. Crnkovich**

Managing Director  
Morgan Stanley



Peter Crnkovich joined Morgan Stanley in 1982 and currently heads its worldwide health care industry investment banking practice. Prior to assuming his current responsibilities, he was responsible for the firm's health care mergers and acquisitions practice and covered U.S.-based health care companies. Additionally, Peter spent three years in the firm's San Francisco office.

Mr. Crnkovich has a B.S. degree from Georgetown University and an MBA from the Stanford Graduate School of Business.

#### **W. Robert Dahl, CPA**

Managing Director  
The Carlyle Group

Mr. Dahl joined The Carlyle Group in May 1999 as a Partner and Managing Director with responsibility for overseeing Carlyle's investments in the health care business. Prior to joining Carlyle, he spent 13 years at Credit Suisse First Boston, most recently as Managing Director and co-head of their U.S. Health Care Group. Mr. Dahl has extensive experience in recapitalizing highly leveraged companies, having also worked in Credit Suisse First Boston's Leveraged Finance Group.

Mr. Dahl received his MBA from the Harvard Business School, where he was a Baker Scholar and a Loeb Rhodes Fellow, and a B.A. from Middlebury College. He currently sits on the Board of Directors of ConnectiCare, Inc., Empi, Inc., IntelliStaf Healthcare, Inc., MedPointe, Inc., and Panolam, Inc.

## Panel Discussions: **FINANCE PANEL**

### **Stewart Hen**

Managing Director  
Warburg Pincus LLC



Mr. Hen is a Managing Director at Warburg Pincus LLC, focusing on life sciences investments in biotechnology, pharmaceuticals, specialty pharmaceuticals, drug delivery, and diagnostics firms.

Prior to joining Warburg Pincus, he was a management consultant at McKinsey & Company where he advised pharmaceutical and biotechnology companies on a range of strategic management issues. Mr. Hen also held a number of R&D and manufacturing positions at Merck & Company.

Mr. Hen is a director of Rib-X Pharmaceuticals, and formerly of The Medicines Company, Triangle Pharmaceuticals and Synaptic Pharmaceuticals. He also serves on the Health Care & Sciences Group of the New York City Investment Fund. He holds an MBA from The Wharton School, an M.S. in chemical engineering from the Massachusetts Institute of Technology, and a B.S. in chemical engineering from the University of Delaware.

### **Michael Kluger**

Founding Partner  
AIG Healthcare Partners



Michael Kluger is a founding partner of AIG Healthcare Partners, L.P. a \$500 million private equity concern located in New York City. Before helping to found AIG Healthcare in 2002, Mr. Kluger spent ten years at Liberty Partners. Prior to Liberty, he spent twelve years at Merrill Lynch where he had various positions in the Investment Banking Group. Mr. Kluger has directed and been responsible for more than 20 middle market transactions exceeding \$3.0 billion in total value. He is or has been a director of Foundation Health, Monaco Coach Company, Allscripts, Inc., NFO Worldwide, as well as numerous private companies.

Mr. Kluger is a graduate of Trinity College, B.A. History (1978) and the University of Chicago, MBA with a concentration in hospital administration (1980).

### **Peter N. Reikes**

Managing Director  
SG Cowen



Mr. Reikes manages SG Cowen's Global Health Care Investment Banking practice and is a member of the firm's Executive Committee. Mr. Reikes joined SG Cowen in June 1999 following 14 years at PaineWebber Incorporated, serving most recently as head of PaineWebber's health care investment banking practice. Throughout his career, Mr. Reikes has managed a wide range of financings and merger and acquisition transaction for companies in the health care services, medical technology, and pharmaceutical/biopharmaceutical industries.

Mr. Reikes is a director of Ricerca Biosciences, LLC and a former director of Tylon Corporation and Biocompatibles Ltd. and the limited partnership boards of Alkermes, Inc., Cephalon, Inc., Gensia, Inc., Genzyme Corporation, and Repligen Corporation. He received an MBA in Finance from The Wharton School at the University of Pennsylvania and a B.A. in Economics from the University of California at Los Angeles.

### **Can the Current Growth of the Medical Device Industry be Sustained?**

While the medical device industry has recently gone through a period of unprecedented growth, a dramatically changing corporate landscape is likely to play a large role in determining the industry's future success. This session is designed to explore current and emerging industry trends with a particular concentration on:

- The impact of new technologies and innovations in helping firms develop a sustainable competitive advantage
- The potential impact of new FDA and Medicare regulations on industry growth
- The effect of increased competition in key therapeutic areas
- The role of mergers and acquisitions in building a sustainable growth model



## Panel Discussions: **MEDICAL DEVICE PANEL**

### **M o d e r a t o r**

#### **Peter C. Lawyer**

Vice President and Director  
The Boston Consulting Group

Peter joined the Chicago office of The Boston Consulting Group in 1989 and was head of the local Health Care practice before transferring to Tokyo in 1998. While in Japan, he consulted to a variety of medical device and technology (MDT), pharmaceutical, and biotech companies.

In July 2001, he returned to Chicago, where he again heads the Chicago Health Care practice and also serves as global leader for the MDT sector. Before joining BCG, he was a reporter for *The Wall Street Journal/Europe* in Brussels, Belgium and a commercial lender for First Bank System in Minneapolis (now US Bank). Peter holds a B.S. in economics from St. John's University (cum laude) and a master's in management from Northwestern University's J.L. Kellogg Graduate School of Management, where he was an F.C. Austin Scholar.

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#### **Kurt H. Kruger**

Former Analyst  
Banc of America Securities

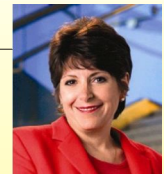
Kurt is a recognized authority on the medical device industry having most recently served as a Managing Director at Montgomery Securities (Banc of America Securities). Prior to that, he acted as a Medical Technology Research Analyst for Hambrecht & Quist before being named Managing Director. Additionally, Kurt held several positions within industry including a number of marketing roles at Guidant and Project Engineer for Open Heart Surgery Products with Sarns/3M. He also spent time as a Management Consultant with PA Consulting.

Kurt received a master's in management from the Sloan School of Management, MIT, an M.S. in Biomedical Engineering from the University of Michigan, and a B.S. in Biomedical Engineering from Brown University.

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#### **Karen A. Licitra**

Company Group Chairman  
Johnson & Johnson  
Ethicon Endo-Surgery, Inc.



Karen joined Johnson & Johnson in 1984 as a medical device representative at Ethicon, Inc. In 1989 she was promoted to Product Director responsible for developing marketing plans and new products for the company's linear stapler product line. In 1991, Karen was promoted to Director of Marketing at Ethicon Endo-Surgery, and in 1996 she was promoted to Vice President, Marketing, and a member of the Board of Directors. In 1997, Ethicon Endo-Surgery acquired Biopsys Medical, a breast biopsy company, and Karen was promoted to Vice President, Breast Care with responsibilities for the development and marketing of products that cover the detection, diagnosis, and treatment of breast disease.

In 2000, Karen was again promoted to the position of Vice President and General Manager, with responsibility for the sales and marketing divisions of all Ethicon Endo-Surgery products. In January 2001, she was then named President of Ethicon Endo-Surgery, Inc., US and in July 2002, Karen was appointed Company Group Chairman, Ethicon Endo-Surgery, Inc.

Karen is a member of the Board of Trustees of the Wellness Community, a center dedicated to helping cancer patients. She is Board member of the Health Improvement Collaborative of Greater Cincinnati and a member of the Strategic Direction Committee of the United Way. Karen holds a B.S. degree in Marketing from Rider College.

## Panel Discussions: **MEDICAL DEVICE PANEL**

### **Frank McCaney** \_\_\_\_\_

Senior Vice President,  
Business Development  
VIASYS Healthcare

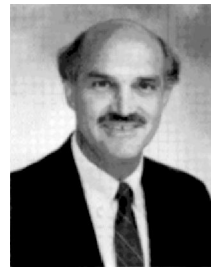
Frank McCaney joined the company in 1998. In November 2001, he became Senior Vice President of Marketing and Business Development and currently has principal responsibility for coordinating M&A activity. Mr. McCaney was with Thermo Electron since 1998 as Vice President of Global Marketing and Business Development. Mr. McCaney was instrumental in taking VIASYS public in 2001, being a contributor to the meetings with investment groups. He is also the head of the VIASYS Technical Advisory Board.

**Where Do We Go From Here: Perspectives on Improving the US Health Care System**

Many within industry and government regard the current U.S. health care system as broken as the growth in health care spending continues to outstrip GDP while quality and access to care remain major social issues. This panel will explore the pros and cons of the current health care system and discuss potential areas for improvement. Specific topics to be covered include:

- How recent trends towards consumer driven health care will impact the current system
- Mechanisms to improve overall quality throughout the entire health care value chain
- National health insurance as a potential solution to today's health care crisis
- The impact of the new Medicare prescription drug plan

Panel Discussions:  
**PAYOR/PROVIDER  
PANEL**



**M o d e r a t o r**

**Doug Werner**

Partner

Torrey Pines Health Group, Inc.

Doug Werner is a partner at The Torrey Pines Health Group, Inc. where he has been consulting for health plan and hospital clients since 1999. He has worked in the managed care industry since 1973, and has extensive hands-on experience during its growth and consolidation phases. Doug was Foundation Health System's Senior Vice President for Strategic Planning and Business Development between 1996 and 1999. At Aetna Health Plans between 1987 and 1996, he was Senior Vice President of the Southern Region and then the Western Region. While at Aetna, Doug initiated and led Aetna's CHAMPUS business. Prior to Aetna, Doug served as President and CEO of Western Health Plans, Inc. and has held senior positions in the health plan operations of CIGNA, National Medical Enterprises, INA Health Plans and several early stage HMOs in California and Florida.

Doug was a Board Member of the California Association of Health Plans from 1994-1996, the Chair of the Executive Committee of the California Coalition for Childhood Immunization, and currently teaches management of healthcare organizations at UCSD in La Jolla, CA.

**Howard P. Forman M.D., MBA**

Associate Professor and Vice Chair  
Yale University



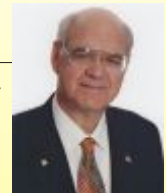
Professor Forman is Associate Professor of Diagnostic Radiology and Management at Yale University and Vice Chair in the Department of Diagnostic Radiology. He is also a Lecturer in the Economics Department at Yale College and in the Healthcare Management Program of the School of Public Health. He currently divides his time between clinical work and Healthcare Finance/Economics educational programs, including the joint degree MD/MBA program at Yale. His research has included assessment of quality in Diagnostic Imaging, including patient awareness of radiation risk.

From 1994-1996, he was a RWJ-Clinical Scholar at the University of Pennsylvania where he also completed an MBA (with Distinction as a Palmer Scholar), majoring in Finance as well as Healthcare Management. During 2001-2002, he worked in the office of Senator Bob Graham (D-FL) as a RWJ-Health Policy Fellow working on the Democratic Caucus prescription drug benefit and other Medicare issues.

He is currently associate editor of the American Journal of Roentgenology and Deputy Editor of the Journal of the American College of Radiology, as well as a member of the Executive Council of the American Roentgen Ray Society. He resides in New Haven, Connecticut.

**G. Gilmer Minor, III**

Chairman and Chief Executive Officer  
Owens & Minor, Inc.



G. Gilmer Minor, III is Chairman and Chief Executive Officer of Owens & Minor, Inc., a \$4.0 billion Fortune 500 distributor of medical and surgical supplies to hospitals, nursing homes and physicians. Mr. Minor has been with Owens & Minor, Inc. all of his working life, having served in various sales, operations and management capacities of increasing responsibility before becoming President in 1981, and Chief Executive Officer in 1984. He was elected Chairman of the Board in May 1994. In April 1999, Mr. Minor relinquished the President title and remains Chairman and Chief Executive Officer.

Mr. Minor also serves on the Board of Directors of SunTrust Banks, Inc., Atlanta, Georgia as well as Owens & Minor, Inc. In addition, he is vice president of the Board of Visitors at the Virginia Military Institute and is the Chairman of the Board of Trustees of the Virginia Health Care Foundation and on the Advisory Board of The University of Virginia School of Nursing. Mr. Minor was recognized as Virginia Industrialist of the Year in 2001 and inducted into the 2003 Greater Richmond Business Hall of Fame.

Mr. Minor is a 1963 graduate of the Virginia Military Institute with a B.A. in History. In 1966, he received his MBA from The Colgate Darden School of Business Administration at the University of Virginia.

## Panel Discussions: **PAYOR/PROVIDER PANEL**

### **Robert C. McDonald, M.D., MBA**

Medical Director,  
Health Care Management  
Anthem Blue Cross and Blue Shield

Dr. Robert C. McDonald is Medical Director, Health Care Management, Anthem Blue Cross and Blue Shield. In this role, he develops and guides clinical strategic initiatives that span multiple business units within Anthem. He has spearheaded enterprise-wide efforts that have led to the creation of Anthem Prescription Management - a top ten pharmacy benefit management company, Anthem Specialty Pharmacy, and the first Anthem provider contracts of national scope. In previous roles with Anthem and predecessor companies, he has served as the Senior Medical Officer of Anthem Alliance Health Insurance Company, as Corporate Medical Director responsible for Anthem Medical Policy Unit, and as the Vice President and General Manager of Athena NA.

Dr. McDonald is a graduate of Cornell University College of Arts and Sciences University of Texas Southwestern Medical School. He is Board certified in internal medicine and has earned an MBA in Health Care Management from the Wharton School at the University of Pennsylvania.



**James J. Mongan, M.D.**  
President and Chief Executive Officer  
Partners HealthCare

Dr. Mongan is President and Chief Executive Officer of Partners HealthCare, a position he assumed on January 1, 2003. Additionally, he serves as a Professor of Health Care Policy and Professor of Social Medicine at Harvard Medical School. From 1996-2002, Dr. Mongan served as President of Massachusetts General Hospital, the largest and oldest teaching affiliate of Harvard Medical School. Prior to MGH, Dr. Mongan spent 15 years as Executive Director of the Truman Medical Center in Kansas City and as Dean of the University of Missouri-Kansas City School of Medicine. He also spent 11 years in Washington, DC where he served as a staff member of the United States Senate Committee on Finance for seven years, working on Medicare and Medicaid legislation, in the Carter Administration as Deputy Assistant Secretary for Health, and the White House as Associate Director of the Domestic Policy Staff.

He has served on the Board of Trustees of the American

Hospital Association, the Kaiser Family Foundation and was a member of the Prospective Payment Assessment Commission of the US Congress. A native of San Francisco, Dr. Mongan received his undergraduate education at the University of California, Berkeley and Stanford University, and his medical degree from Stanford University Medical School.

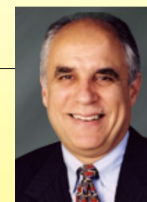
**Patricia M. Nazemetz**  
Vice President, Human Resources  
Xerox Corporation



Patricia M. Nazemetz has been Vice President, Human Resources for Xerox Corporation, Stamford, Connecticut since 1999. She became a corporate officer in January 1999. Nazemetz joined Xerox Corporation in 1979 as a benefits operations manager and held a variety of assignments in human resources before being named to her current position in 1999. Before joining Xerox Corporation, she worked as a benefits analyst at W.R. Grace & Company.

She received a B.A. in mathematics from Fordham in 1971 and a master of arts degree in philosophy from Fordham in 1980.

**William C. Popik, M.D.**  
Senior Vice President and  
Chief Medical Officer  
Aetna Inc.



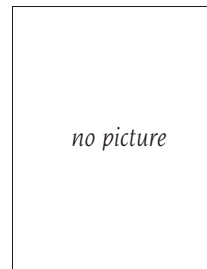
Dr. Popik directs the company's quality, patient management, medical policy, and health informatics units. Under his direction, Aetna has introduced new Disease Management programs, expanded its Case Management functions, and made its Patient Management processes simpler and easier for physicians to use. Dr. Popik has more than 30 years' experience as a practicing physician and senior health care executive. Prior to joining Aetna, he was the National Medical Director at CIGNA HealthCare; Senior Vice President and Chief Medical Officer of Health Net HMO California; and Vice President, Medical Affairs for QualMed Plan for Health.

He completed a family practice residency program at the University of California, San Francisco, received his M.D. degree from Columbia University College of Physicians and Surgeons, and holds a B.A. degree in psychology from Yale University.

### **Effective Corporate Merger and Acquisition Strategies: Is Bigger Always Better?**

With increasing pressure on product pipelines, many pharmaceutical companies are resorting to mergers and acquisitions to sustain their profitability. However, the question remains whether size is the critical component of a successful growth strategy. This panel will address this key question by delving into specific topics including:

- The different drivers behind M&A strategies for large pharmaceutical companies and niche players
- The true impact of these strategies on drug development pipelines and the quest for the next blockbuster drug
- The effect of consolidation on sales and marketing organizations
- What the future holds for pharmaceutical companies in terms of continued mega mergers or a trend toward de-consolidation



## Panel Discussions: **PHARMACEUTICAL PANEL**

### **M o d e r a t o r**

**Michael McCaughan**  
Editor-In-Chief  
"The Pink Sheet"

Michael McCaughan is the Editor-In-Chief of "The Pink Sheet," a weekly newsletter covering the prescription drug and biotechnology industry published by F-D-C Reports since 1939. Mr. McCaughan joined "The Pink Sheet" in 1990 as a business reporter. He became Assistant Managing Editor in 1993, Managing Editor in 1995, and Editor-In-Chief in 1996.

Mr. McCaughan has a B.A. in English from Yale University.

### **Bruce Grant**

Vice President, Publishing  
and Strategic Consulting  
Medical Broadcasting Company



A lifelong practitioner of healthcare communications, Bruce brings over three decades of experience in pharmaceutical promotion, medical education, medical video and interactive media production, and strategic e-business services to his position as vice president of both publishing for ePharmaceuticals and strategic consulting for MBC. Before joining MBC, he was managing director of the pharmaceutical marketing consulting firm eStrategies and, before that, director of innovation at Frontier Media Group, where he was a founder of its pharmaceutical practice.

Bruce has also been a copywriter and creative strategist on many of the industry's leading brands at many of the industry's leading agencies. His past and present clients span the leadership of the biopharmaceutical industry, including Abbott, AstraZeneca, Aventis, Bristol-Myers Squibb, Cephalon, GlaxoSmithKline, Johnson & Johnson, Eli Lilly, Merck, Novartis, Pharmacia, Pfizer, Roche, Sanofi-Synthelabo, Schering-Plough, and Wyeth, to name just a few. A frequent speaker and author on pharmaceutical e-business issues, he received his BA degree in philosophy and fine arts from Goddard College in 1975.

### **David P. Holveck**

President  
Johnson & Johnson  
Development Corporation



David P. Holveck was named President, Johnson & Johnson Development Corporation in March, 2003. Mr. Holveck joined the Corporation as a company group chairman in October 1999, following the completion of the merger of Centocor, Inc., and Johnson & Johnson. Prior to joining Johnson & Johnson, he had been Chief Executive Officer of Centocor, Inc., since 1992 and a member of its board of directors since 1994. Previously, Mr. Holveck held various executive positions with Centocor, Inc. In 1992 he assumed the role of President and Chief Operating Officer and later that year was named president and Chief Executive Officer. Prior to joining Centocor, Inc., he had held positions at General Electric Company, Corning Glass Works, and Abbott Laboratories.

Mr. Holveck is a board member of the Liberty Science Center, the University City Science Center, and the Eastern Technology Council. He is also on the Board of Governors for Pennsylvania's State System of Higher Education and serves on the Board of Trustees for The Fund for West Chester University. He is a former board member of the Biotechnology Industry Organization, Pharmaceutical Research and Manufacturing Association (PhRMA) and CV Therapeutics, Inc., and a former member of the advisory board of Micromet GmbH. He was honored by the Crohn's & Colitis Foundation in 1997 as Man of the Year of America.

Mr. Holveck received a B.S. in education/science from West Chester University and received an honorable discharge from the U.S. Navy.

## Panel Discussions: **PHARMACEUTICAL PANEL**

### **Jonathan Northrup**

Director, Corporate Strategy  
and Business Development  
Eli Lilly



Jon Northrup is Director, Corporate Strategy and Business Development at Eli Lilly. He has held extensive positions at Lilly in Strategy, Business Development, Strategic Asset Management, Marketing Plans and Market Research, Sales and Finance while at the company. Jon has also been in both the USA and International branches of the business.

He is a published author on the subject of prescription pricing, and is currently writing a chapter on the pharmaceutical industry for a new book to be edited by Dr. Lawton Burns entitled "The Producers: The Business of Healthcare Innovation" which will be published by Cambridge University Press. Jon is a founding sponsor of the Wharton Business Conference and has served on the Board for the Conference from its inception. Jon is an avid outdoorsman and is Scoutmaster for Boy Scout Troop 268 in Indianapolis.

### **Martin K. Reeves**

Vice President and Director  
The Boston Consulting Group



Martin Reeves is a Vice President and Director in the New York office of The Boston Consulting Group, where he leads the health care practice. He joined BCG in 1989 in London and later moved to Tokyo, where he led the Japan health care practice for eight years. Martin has led client assignments in most functional areas and many segments of the healthcare industry in the U.S., Europe and Japan. Before joining BCG, Martin worked for Zeneca in Japan and in the U.K., in marketing and strategic planning functions.

Martin holds a Triple First Class MA from Cambridge University and an MBA from Cranfield Institute of Technology. He also studied physiology at Tokyo University and Japanese at Osaka University.

### **Martin Soeters**

President  
Novo Nordisk Pharmaceuticals, Inc.



Martin Soeters was named president of Novo Nordisk Pharmaceuticals, Inc., Princeton, New Jersey, in August 2000. He has been with Novo Nordisk since 1980 in a number of international sales and marketing positions. These include his serving as general manager of the company's France, Belgium, and Holland affiliates. Just prior to coming to the United States, Soeters was senior vice president and head of International Marketing at the company's corporate headquarters in Denmark.

Soeters is a member of the Board of Trustees of the HealthCare Institute of New Jersey. Born in Rotterdam, the Netherlands, Mr. Soeters is fluent in English, French, German and Danish, in addition to his native Dutch.

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