

Tibia-Tribune

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President's Message

Benjamin A. Alman, MD



Dear Colleagues,

The Future of Orthopaedics

We are entering an exciting time in our field. All at once, we're seeing advances in technology, a better understanding of biology, new ways of analyzing big data, and changes in the way people are thinking about providing the best care for our patients with the financial resources available. These changes will have profound influences in how we care for patients in the coming decades. Being prepared for what is coming and how it will contribute to charting our own future will allow us to help chart a better future for our patients, our profession, and the population at large.

The ways we provide patient care are always evolving, which is partially driven by finances. The ever-increasing costs of healthcare in the US are not sustainable, and indeed these costs are out of step with measurable improvements in care. To meet this challenge, there is a focus on population health-based initiatives to improve the effectiveness and efficiency of care. As we think about building a healthier population, a focus on preventative care (like avoiding injuries and improving bone health) will ultimately lead.

New developments in data analysis, such as machine learning and artificial intelligence, as well as a focus on big data (genomics, metabolomics, radiomics and other "omics") will improve our ability to predict and diagnose disorders – a new form of personalized care. Such data will allow a better focus on who would best be served by intervention, utilizing advanced imaging techniques and other new diagnostic tools involving large data predictive analysis.



A more complete understanding of biology, including disease etiology and mechanisms of regenerative medicine, can be used to develop new therapies and better-focused care. As an example, the Advanced Research Projects Agency for Health (ARPA-H, funded by the US government) has funded a focused program, Novel Innovations for Tissue Regeneration in Osteoarthritis (NITRO). This program is intended to develop new therapies to regenerate joints in osteoarthritis, to be used in place of arthroplasty.

Such novel treatments, however, need to be built on rigorous science, and new treatments will need careful clinical trials. Treatments that are not based on such a foundation are less likely to be effective, as was recently demonstrated in a randomized trial on MSC cell therapy for intra-articular injection for knee osteoarthritis, which showed a lack of efficacy over the use of intra-articular corticosteroid injection.

New technologies have the potential to make surgeries less invasive and safer, overall. Robotics, new imaging approaches and computer analysis are a few of the advances arriving in

orthopaedic surgery. While these technologies have great promise, they need to be applied in a definitively safe manner. For example, the use of robots in surgery can have deleterious outcomes,² and as such important safety concerns need to be considered before more widespread implementation.

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President's Message continued

As we think about the future, it is important that we not only stay abreast of possibilities, but also help to chart their course. In order to do this, we need to support innovative thinking and research into how these new opportunities will be implemented to improve care. There is data on how to best prepare ourselves for the challenge.

Comroe and Dripps undertook a comprehensive study to determine where certain medical advances in cardiovascular or pulmonary disease treatment originated.³ Their conclusion was that supporting innovative research was critical in the development of new therapies, regardless of its immediate practical implications. In order for us to best use new developments in orthopaedics, we need to encourage innovative thought and work, throughout the entire field. This is especially important in our training programs, where encouraging this innovative thought among the next generation of orthopaedists will ensure that we'll always be providing the best care possible.

Indeed, in order to fulfill the Oath of Hippocrates that we took when we graduated medical school, it is our duty to foster and support new exploration in the field to ensure that we "do no harm" which could be caused by impeding the rigorous development of new therapies, or by utilizing treatments that are not yet proven efficacious.

The upcoming Southern Orthopaedic Association meeting in Miami Beach will have a special focus on the future of orthopaedic surgery. There will be opportunities to learn about clinical trials, research findings, and real-world applications of regenerative medicine in orthopaedics. Further, there will be opportunities to learn more about how technology is transforming pre-operative planning, surgical procedures and post-operative care, as well as gain insights into evolving models for financing this care (including value-based care, bundled payments and other reimbursement strategies).

Along with sessions discussing both the current state and future directions of orthopaedic care, members will have a chance to explore innovative partnerships that can enhance research, education and clinical practice, supporting a long-term vision for orthopaedists and ultimately paving the way for future breakthroughs.

I invite you to consider our exciting future, and participate in helping to plot the course for orthopaedics in the decades ahead.

Benjamin Alman

Benjamin A. Alman, MD

President, Southern Orthopaedic Association

2024 Calendar of Events**March 2024**

Resident Award Manuscripts Requested

March 14-16, 2024

Southern at the SEC, Nashville, TN

April 2024

Abstracts Selected and Notifications Mailed

April 2024

2024 Annual Meeting Preliminary Program

Mailed

July 17-20, 2024

41st Annual Meeting, Miami Beach, FL

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.

Welcome New Members

SOA is pleased to welcome the following New Members to the Southern Orthopaedic Association.

Martin A. Baggett, MD, Hawkinsville, GA
 Austin J. Broussard, MD, New Orleans, LA
 Major B. Burch, MD, Oxford, MS
 Thomas R. Cadier, MD, Columbus, NC
 Jon B. Carlson, MD, Louisville, KY
 William A. Cenac, MD, New Iberia, LA
 Russell J. Clark, MD, La Grange, TX
 Philip N. Collis, MD, Hazard, KY
 Shari Cui, MD, Columbia, SC
 James Dallis, MD, Riverdale, GA
 John F. Dalton, MD, Atlanta, GA
 Michael Duffy, MD, Plano, TX
 Tyler Gonzalez MD, MBA, Lexington, SC
 Bernard Kemker, MD, Rocky Mount, NC
 Ronald Lewis, MD, Charleston, SC
 Robert L. Liljeberg, Jr., MD, Troy, AL
 Micah L. MacAskill, MD, Huntington, WV
 Heather McIntosh, MD, Charleston, SC

Sunil Menon, MD, MPH, Coffeyville, KS
 Amit Momaya, MD, Birmingham, AL
 Carl Narducci, MD, Birmingham, AL
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 Sydney W. Sherrell, Knoxville, TN
 Hardy Singh, MD, FAAOS, Rocky Mount, NC
 Jeffrey N. Spaw, MD, College Station, TX
 Louis M. Starace, MS, MD, Palm Beach Gardens, FL
 Paul van Deventer, MD, Madisonville, LA
 Luther Wolff, MD, Columbus, GA
 Timilehin O. Wusu, MD, Lawrenceville, GA
 Adnan Zubair, MD, Columbus, GA
 Mark Zunkiewicz, MD, Daytona Beach, FL

Upcoming SOA Meeting



41st Annual Meeting
 July 17-20, 2024
 The Fontainebleau
 Miami Beach, FL

SOA Newsletter

If you have any information you would like included in the next issue, of the *Tibia Tribune*, please email material to Heather Skinner at hskinner@datatrace.com

Meet Our New Board Member



Holly Tyler-Paris Pilson, MD
 Winston-Salem, NC

Dr. Pilson is a graduate of the University of South Carolina and the Wake Forest University School of Medicine. She completed her residency in Orthopaedic surgery at Wake Forest Baptist Health, and a fellowship in Orthopaedic Trauma surgery at Sonoran Orthopaedic Trauma Surgeons in Scottsdale, AZ. She is currently a board-certified Orthopaedic trauma surgeon and Associate Professor of Orthopaedic Surgery at Atrium Health Wake Forest Baptist.

She holds many leadership roles including Vice Chair of Social Impact, Co-Director of Diversity and Inclusion, and Co-Director of Clinical Research for the Department of Orthopaedic Surgery and Rehabilitation. In 2023, she was named Associate Dean for JEDI

(Justice, Equity, Diversity and Inclusion) for the Wake Forest University School of Medicine. In this role, Dr. Pilson plays a critical role in the Academic Enterprise's mission and vision for JEDI and is responsible for assisting with the development and implementation of strategic interventions to create and enhance a culture of equity, diversity, and inclusion, a climate of belonging, and work toward eradicating structural racism, gender bias and all forms of discrimination across the collective Academic Enterprise. She is working to support aligning efforts across the enterprise to drive impactful equity, gender justice and anti-racism programs for faculty, trainees, and staff with a commitment to improving the health of all persons.

Dr. Pilson is a proud member of the Lumbee tribe of North Carolina, and is the first and only Lumbee Orthopaedic Surgeon, from her tribe of over 55,000 members. Dr. Pilson has a passion for health equity and workforce diversity in the field of medicine in general and

Orthopaedic Surgery specifically. She is a member of the Diversity Advisory Board of the American Academy of Orthopaedic Surgeons (AAOS) and serves as an active mentor through various mentorship programs at Atrium Health Wake Forest Baptist, as well as national programs including the Association of American Indian Physicians, Nth Dimensions, the J. Robert Gladden and Ruth Jackson Orthopaedic Societies.

Second only to her dedication to compassionate patient centered care, lies her a passion for educating the next generation of surgeons, physician assistants, nurses and beyond. In 2021, she was the recipient of the Wake Forest Family Medicine Residency Outstanding Faculty Award and the Wake Forest School of Medicine Orthopaedic Surgery & Rehabilitation Faculty of the Year. In 2021 and 2023, Dr. Pilson was the recipient of the Robert D. Teasdall, MD Faculty Teaching Award in the Department of Orthopaedic Surgery.



Recap of the 40th Annual Meeting

The 40th Annual Meeting was a tremendous success, with an outstanding Scientific Program put together by Program Chair, Dr. Shawn R. Gilbert along with the SOA Program Committee.

Program highlights included Presidential Guest Speaker, Travis Tygart of the United States Anti-Doping Agency with an enlightening presentation on athlete doping.

The following day, the L. Andrew Koman, MD Distinguished Southern Orthopaedist, Dr. Paul F. Lachiewicz, gave an educational talk, "Three Lessons from a Career in Hip and Knee Arthroplasty" and Dr. H. Clayton Thomason III on the last day gave an inspiring Presidential Address "You Can't Go Home Again." In addition to the exceptional Scientific Program, there were also E-Poster presentations.

The Meeting kicked off with the always fun Welcome Dinner at the Baytowne Marina with stunning sunset views over the water. 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 the great nightlife offered at the Village of Baytowne Wharf. The Meeting was brought to a close with a wonderful Gala Dinner Dance. Spouse Hospitality included a breakfast every morning and they 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 Sandestin on the SOA website at www.soaassn.org.

We look forward to seeing you this summer at the Fontainebleau Miami Beach in Miami Beach, Florida, July 17-20, 2024!

2023 Poster Awards

Congratulations to the following 2023 SOA E-Poster Award Recipients. The award posters were presented at the 40th Annual Meeting at Hotel Effie.

1st Place Poster Award

Joseph P. Costello, BS, University of Miami Miller School of Medicine

Adverse Events in Robotic Assisted Arthroplasty Reported to the FDA

2nd Place Poster Award

Abdias Girardi, BS, University of Alabama at Birmingham

*Presented by Audria Wood, BS, MPH
Variability in Physical Therapy Protocols following Total Shoulder Arthroplasty

3rd Place Poster Award

Taylor P. Stauffer, BS, Duke University
Cost Analysis of Surgical Approach in Total Hip Arthroplasty



Thank You Annual Meeting Exhibitors

The Southern Orthopaedic Association would like to thank the grantors and exhibitors of the Southern Orthopaedic Association's 40th 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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Saving for the High Cost of College: New Rule Offers Additional Options in 2024

By David Mandell, JD, MBA and Bob Peelman, CFP®

At many colleges and universities schools, the pace of tuition increases has dwarfed the inflation rate, a statistic that all but ensures that higher education may be out of reach for many of today's American children. Student loans can be taken, but if managed improperly, these loans can saddle a young adult with insurmountable debt during their prime earning years.

For this reason, many physicians strive to help their children and grandchildren pursue a college or post-graduate degree. A college savings plan can leverage the power of time and compounding interest when saving money for higher education. This article focuses on the most widely used college savings plans, often referred to as 529 plans.

Named after Section 529 of the Internal Revenue Code, 529 plans are state-sponsored, tax-advantaged savings accounts designed to help families and individuals save for future education expenses.

529 Plan Basics

- **Tax Benefits:** Contributions to 529 savings plans are not federally tax-deductible, but the earnings grow tax-free if used for qualified education expenses. Many states also offer state income tax deductions or credits for contributions to their own state's 529 plan.
- **Qualified Expenses:** Qualified education expenses can include tuition, fees, books, supplies, and equipment required for enrollment or attendance at an eligible educational institution. Additionally, up to \$10,000 per year per beneficiary can be used for K-12 tuition expenses.
- **Flexibility:** 529 plans offer flexibility in terms of changing beneficiaries. If one child doesn't use all the funds, you can often change the beneficiary to another eligible family member without incurring penalties.
- **Contributions:** While there are maximum limits to how much you can contribute to a 529 plan, these limits are generally quite high, often exceeding \$300,000 or more depending on the state.

529 plans have been great educational tools to help families save money for college and use that money, tax-free, to pay for college expenses. While the plans are still relatively young, they continue to adapt and get new benefits as the popularity of using these accounts continues to rise.

New solution for 529 plans offers added flexibility

We often hear from parents and grandparents about the rigid rules for qualified distributions from 529 plans. Many worry that funds will be stranded in 529 plans by children who don't use them.

While 529 funds are supposed to be earmarked for education expenses, the new Roth IRA transfer provision provides a workaround for balances that aren't being used for educational purposes. Without the provision, the growing, unused funds would be taxed at the investor's income tax rate—and if the funds were used for ineligible expenses, the money would get hit with a 10% tax penalty.

Beginning in 2024, taxpayers with 529 plan balances will be able to transfer those balances to Roth IRAs. However, this provision comes with many rules and restrictions, including:

- A lifetime maximum of \$35,000 can be rolled over from a 529 plan to a beneficiary's Roth IRA.
- Annual Roth IRA contribution limits apply to rollovers (in 2023, the limit is \$6,500, which means it would take six years to convert \$35,000 from a 529 plan to a Roth IRA).
- Because the annual transfer amount is subject to the IRA limit, the beneficiary must have compensation.
- Conversions can only be made to a beneficiary's Roth IRA; a parent saving with a 529 plan in a child's name cannot convert unused funds back into their own retirement account.
- Rollovers are not allowed until a 529 account has been open for at least 15 years.
- Contributions to the 529 plan made within the previous 5 years (and the earnings from those contributions) are not eligible to be transferred.

As an example, Dr. Smith is the owner of a 529 plan for his daughter Jane, age 25. Dr. Smith opened the account when Jane was an infant. The account had more than was needed for Jane's education, and Jane has no further plans for formal education. Jane has no siblings and currently has no children. Let's assume the 2024 IRA contribution limit remains at the current limit of \$6,500. Dr. Smith can transfer \$6,500 in 2024 to Jane's Roth IRA account, assuming Jane has not made any IRA contributions in 2024 and Jane has compensation income. He can continue to transfer \$6,500 per year (or the indexed IRA contribu-

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tion limit amount) into Jane's Roth account annually until he has transferred \$35,000 into the account from the 529 plan. Jane's Roth IRA will grow on a tax-deferred basis, and she will be able to take tax-free distributions from the account after age 59½.

This new rule helps families who have set aside funds in 529 plans avoid taxes and penalties if the beneficiary ultimately finds an alternative way to pay for higher education. Because the Roth IRA income limits (\$153,000 for single filers and \$228,000 for joint filers in 2023) do not apply to this transaction, even high-income investors who have been held back from creating Roth IRAs could do so using the 529 plan transfer.

Roth IRAs are great planning tools for a variety of reasons:

- Growth is tax-free for qualified distributions (generally age 59 ½ and a 5-year holding period)
- There are no Required Minimum Distributions (RMDs) at age 73 or older (Note SECURE 2.0 changes the RMD age to 73, and eventually, 75)
- Growth can continue for 10 years beyond the death of the Roth owner and spouse (if the spouse is the beneficiary)

With careful planning and an early start on saving, 529 plans make excellent tax-efficient college savings options and allow you to harness the incredible power of a compounding interest to help your child or grandchild achieve their higher education dreams. The added flexibility with 529-to-Roth conversions makes these plans an even more attractive tool for achieving education and retirement goals.

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Support the SOA Education Fund

Make your mark on the future by helping to support the SOA Education Fund (a 501[C]3 tax-exempt fund) with your charitable contribution. The SOA established this 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 have helped to make possible. These resident research grants will continue to be a focus for the SOA. We encourage you to make a donation to help the SOA achieve its goals for funding educational programs for residents. It is a worthy endeavor, and one that will endure for generations.

The process to donate is simple. Just go to <https://www.soaassn.org/donate> and you can make a donation instantly.



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SAVE THE DATE
41st Annual Meeting
July 17-20, 2024

The Fontainebleau | Miami Beach, FL

