

PiperJaffray®

HEARTLAND
SUMMIT  2013

AUGUST 14TH AND 15TH, 2013

THE MINNEAPOLIS CLUB

729 Second Avenue South • Minneapolis, Minnesota 55402

THE HEARTLAND SUMMIT: An annual gathering of leaders across all of healthcare to discuss the ideas shaping the industry. Featuring a unique panel-only format, industry leaders candidly discuss the major areas of growth, opportunity and controversy in healthcare. Investors and healthcare leaders gain a 'Big Picture' perspective on the current themes in healthcare, complemented by an annual rotation of focused discussions on selected major areas of opportunity in medical technology, therapeutics and healthcare services & IT.

HEARTLAND 2013: This year, we are pleased to have two never-before-seen panels of CEOs and CMOs from the world's largest healthcare companies discussing the 'State of the Industry' in healthcare. In addition, our deep-dive discussions will cover some of the biggest ideas impacting the market, including predictive analytics in healthcare data, the increasing focus in pharma on hematological drugs, and emerging therapies in peripheral vascular devices.

SCHEDULE OF EVENTS

WEDNESDAY, AUGUST 14TH – THE BIG PICTURE IN HEALTHCARE

9:00 – 9:45 a.m. **Registration and Continental Breakfast** – Main Dining Room, 3rd floor

9:45 – 10:00 a.m. **Welcome and Opening Remarks:**
Andrew Duff, Chairman and CEO, Piper Jaffray

10:00 a.m. – 12:00 p.m. **State of the Industry CEO Panel: The Big Picture from the Biggest Leaders**
Moderated by Brooks West, Senior Research Analyst, Piper Jaffray
A never-before-seen panel with the CEOs of the largest organizations across the entire healthcare landscape, discussing their views on innovation and value, mature vs. emerging market opportunities, acquisition strategies, changing global regulatory environments and significant controversies and opportunities impacting their businesses and the market.

- Neal Patterson, Chairman, President & CEO, Cerner Corporation (CERN)
- Alex Gorsky, Chairman & CEO, Johnson & Johnson (JNJ)
- George C. Halvorson, Chairman & CEO, Kaiser Permanente
- Omar Ishrak, Chairman & CEO, Medtronic, Inc. (MDT)
- Steve Hemsley, President & CEO, UnitedHealth Group (UNH)

WEDNESDAY, AUGUST 14TH – THE BIG PICTURE IN HEALTHCARE

12:00 – 12:30 p.m.

Lunch

Box lunches will be provided to enjoy during the Keynote Address

12:30 – 1:30 p.m.

Lunch – Keynote Address: Governor Mike Leavitt, Founder and Chairman, Leavitt Partners, and Former Secretary, U.S. Department of Health and Human Services

After three terms as Governor of Utah, Administrator of the Environmental Protection Agency, and as the 20th Secretary of Health and Human Services, Michael Leavitt has an inside perspective on the role that government continues to play in the health sector. Most recently, Secretary Leavitt is working closely with several states as they implement the Patient Protection and Affordable Care Act. We look forward to hearing his unique perspectives on the challenges and opportunities in the healthcare market.

1:30 – 1:45 p.m.

Break

1:45 – 2:45 p.m.

Big Ideas in Healthcare Information Technology: Big Data Moderated by Sean Wieland, Senior Research Analyst, Piper Jaffray

Big Data has the potential to truly reform healthcare by offering clinicians with insight to help make better decisions at the point of care. Big data and predictive analytics will refine and drive compliance with existing care protocols, and aid in the development of new ones. Whoever has the data and the mechanisms to deliver the clinical intelligence to the point of care will be the winners in this emerging technology.

- Jeff Townsend, EVP & Chief of Staff, Cerner Corporation (CERN)
- Colin Hill, Chairman, CEO, President & Co-Founder, GNS Healthcare, Inc.
- Andy Slavitt, Group Executive Vice President, Optum

2:45– 3:45 p.m.

Big Ideas in Biotechnology: Advent of Patient Friendly Drugs for Oncology and Hematological Malignancies

Moderated by M. Ian Somaiya, Senior Research Analyst, Piper Jaffray

We will explore reasons for the increase in the number of drugs in development for the treatment of oncology and hematological malignancies. We will also discuss the potential of these targeted treatments to replace chemotherapy and turn cancer into a chronic disease with better patient outcomes.

- Christopher P. Leamon, PhD, Vice President, Research & Development,

WEDNESDAY, AUGUST 14TH – THE BIG PICTURE IN HEALTHCARE

Endocyte, Inc. (ECYT)

- Julian Adams, PhD, President, Research & Development, Infinity Pharmaceuticals, Inc. (INFI)

3:45 – 4:00 p.m.

Break

4:00 – 5:30 p.m.

State of the Industry CMO Panel: New Product Strategy
Moderated by Matt Miksic, Senior Research Analyst, Piper Jaffray
and Brooks West, Senior Research Analyst, Piper Jaffray

With some of the most influential physicians in the world overseeing the R&D investment of billions of dollars, this discussion will focus on: criteria for new products including current and future economic and clinical hurdles; build vs. buy analyses and tensions/trade-offs between “innovation” and “value”; mature vs. emerging market product strategies; and evolving global regulatory environments.

- Mark A. Turco, MD, FACC, Chief Medical Officer, Vascular Therapies, Covidien plc (COV)
- Bill Hait, MD, PhD, Global Head, Janssen Research & Development, LLC, the pharmaceutical companies of Johnson & Johnson (JNJ)
- Mark Carlson, MD, SVP & Chief Medical Officer, St. Jude Medical Inc. (STJ)
- Richard Migliori, MD, EVP, Medical Affairs & Chief Medical Officer, UnitedHealth Group Incorporated (UNH)

5:30 – 6:00 p.m.

Investment Banking M&A and Capital Markets Update and “Big Picture”
Closing Remarks:

Jon Salvesson, Vice Chairman, Investment Banking, Piper Jaffray

6:00 – 7:00 p.m.

Cocktail Reception – Main Lounge Foyer, 2nd floor

7:00 p.m.

Dinner – Main Lounge, 2nd floor

THURSDAY, AUGUST 15TH – BIG IDEAS IN MEDICAL DEVICE TECHNOLOGIES: EMERGING THERAPIES IN PERIPHERAL MEDICINE

Day Two will consist of panel discussions on major therapeutic opportunities for device therapies in peripheral disease. In a twist this year, the panels will consist of company leaders and moderated by referring and target physicians. Each panel will also contain payor/provider participants.

7:00 – 8:00 a.m. **Continental Breakfast** – Main Dining Room, 3rd floor

8:00 – 10:00 a.m.

Peripheral Vascular Disease (PVD) Panel

Moderated by Brooks West, Senior Research Analyst, Piper Jaffray

Due to disease prevalence, more mature clinical data, and new reimbursement, PVD has returned as a significant therapeutic opportunity. Anticipated topics include drug-eluting balloons, peripheral stenting, atherectomy, and venous therapies.

- Jeff Mirviss, SVP & President, Peripheral Interventions, Boston Scientific Corporation (BSX)
- Stacy Enxing Seng, President, Vascular Therapies, Covidien plc (COV)
- John DeFord, PhD, SVP, Science, Technology & Clinical Affairs, C.R. Bard, Inc. (BCR)
- John McDermott, Chairman, President & CEO, Endologix Inc. (ELGX)
- Sean Salmon, SVP & President, Coronary and Renal Denervation, Medtronic, Inc. (MDT)
- Scott Drake, President & CEO, Spectranetics Corporation (The) (SPNC)
- Neil Hattangadi, MD, VP & GM, Peripheral Vascular, Volcano Corporation (VOLC)

Participating physicians:

- Michael D. Horowitz, MD, MBA, National Medical Director, UnitedHealth Group Incorporated (UNH)
- Luis A. Sanchez, MD, FACS, Chief, Section of Vascular Surgery and Professor of Vascular Surgery, Washington University School of Medicine in St. Louis
- Additional panelists to be announced

10:00 – 11:00 a.m.

Hypertension Panel

Moderated by Brooks West, Senior Research Analyst, Piper Jaffray

Discussion of emerging device therapies in one of the largest potential untapped device therapeutic markets.

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- Sean Salmon, SVP & President, Coronary and Renal Denervation, Medtronic, Inc. (MDT)
- Frank Callaghan, President, Cardiovascular and Ablation, St. Jude Medical Inc. (STJ)

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- Additional panelists to be announced

11:00 a.m.

Closing Remarks and Lunch

Box lunches will be available prior to departures for off-site events, scheduled company visits and airport.