



## LEERINK SWANN

Leerink University: Demystifying Healthcare Investing  
Thursday, October 1<sup>st</sup> and Friday, October 2<sup>nd</sup>, 2009

Tentative Agenda (as of 9.28.09)

Le Parker Meridien  
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### Thursday, October 1, 2009

Time	All meetings will be held in the Azekka Room, Third Floor
7:30-8:00am	<b>Conference Registration and Continental Breakfast (Azekka Room Foyer, Third Floor)</b>
7:50-8:00	<b>Welcome Remarks and Agenda Overview</b> Stephen Weiss, Senior Managing Director, Head of Equity Capital Markets, Leerink Swann
8:00-8:30	<b>Handicapping Drug Development by the Numbers: Statistics for Investors</b> Frank David, MD, PhD, Manager, Leerink Swann Strategic Advisors
8:30-9:30	<b>Understanding the FDA and Therapeutics: Clinical Development Guidelines, Unique Considerations, Common Mistakes</b> Heidi Jolson, Consultant; former Director, Division of Antiviral Drug Products, FDA
9:30-10:30	<b>Investing Around Biotechnology Companies' Key Events</b> Josh Schimmer, MD, Senior Biotechnology Analyst, Managing Director, Leerink Swann
10:30-10:45	<b>Break</b>
10:45-11:45	<b>Assessing a Drug Candidate Through Discovery and Development: Insights for Investors</b> Bruce Littman, MD, Head, Translational Medicine Associates; former Vice President – Global Head of Translational Medicine, Pfizer Inc.
11:45-12:30pm	<b>Predicting Therapeutic Product Life Cycles: Commercial Ramps, Competitive Risks, Genericization</b> Seamus Fernandez, Senior Large Cap Pharmaceuticals Analyst, Managing Director, Leerink Swann Gary Nachman, Senior Branded Specialty Pharmaceuticals Analyst, Director, Leerink Swann
12:30-1:00	<b>Lunch</b>
1:00-1:45	<b>Understanding the FDA and Diagnostics: IVD-MIA, Companion Dx, Personal Genomics</b> John L. Sullivan CFA, Director of Research and Healthcare Investment Strategist, Leerink Swann Isaac Ro, Senior Life Sciences and Diagnostics Research Analyst, Leerink Swann
1:45-2:45	<b>Reimbursement Under Government Healthcare Programs</b> Thomas R. Barker, Partner, Foley, Hoag LLP; former acting General Counsel, U.S. Department of Health and Human Services
2:45-3:00	<b>Break</b>
3:00-4:00	<b>Washington Healthcare Policy Overview and Update</b> Robert Laszewski, President, Health Policy and Strategy Associates
4:00-5:00	<b>Translating Washington Policy to Investment Returns</b> Kris Jenner, MD, Portfolio Manager, T. Rowe Price

### Friday, October 2, 2009

Time	All meetings will be held in the Azekka Room, Third Floor
7:00-7:20am	<b>Conference Registration and Continental Breakfast (Tansa Room Foyer, Third Floor)</b>
7:20	<b>Welcome Back</b> Stephen Weiss, Senior Managing Director, Head of Equity Capital Markets, Leerink Swann
7:30-8:45	<b>Healthcare Investing's Future: Life Sciences and Molecular Diagnostics, HCIT, Emerging Therapeutics</b> Risa Stack, Ph.D., Partner, Kleiner Perkins Caufield & Byers Daniel C. Lubin, Managing Partner, Radius Ventures Carl Goldfischer, MD, Investing Partner and Managing Director, Bay City Capital
8:45-9:30	<b>The Larger Therapeutics Company's Business Development Decisions</b> George Golumbeski, Ph.D., Senior Vice President, Business Development, Celgene Corporation
9:30-10:15	<b>Creating Investor Value in Development-Stage Therapeutics Companies</b> Alan Auerbach, CEO, President and Founder, Cougar Biotechnology, now part of Johnson & Johnson John Celebi, VP, Business Development, New Product Planning and Alliance Management, ArQule, Inc.
10:15-10:30	<b>Break</b>
10:30-11:15	<b>Understanding the FDA and Medical Devices: Streamlined Pathways, Changing Purview, Product Recalls</b> Miriam C. Provost, Ph.D., Senior Consultant, Biologics Consulting Group, Inc.; Former Director for Engineering and Science Review, Office of Device Evaluation, CDRH at FDA
11:15-Noon	<b>Strategy and Business Development in Largecap Medical Technology – A Conversation for Investors</b> Paul LaViolette, SV Life Sciences, Venture Partner; former Chief Operating Officer, Boston Scientific Corporation Rick Wise, Senior Medical Technology Analyst, Managing Director, Leerink Swann
Noon-12:30pm	<b>Lunch</b>
12:30-1:00	<b>Creating Investor Value in Smallcap Medical Technology</b> Kevin Conroy, President and CEO, EXACT Sciences; former President and CEO, Third Wave Technologies
1:00-1:45	<b>Healthcare in Emerging Economies: Opportunities and Risks for Investors</b> Andrey J. Zarur, Ph.D., Managing Partner, Kodiak Venture Partners, World Economic Forum, Young Global Leader and Co-Chair of the Healthcare Global Redesign Initiative
1:45-2:30	<b>Healthcare Investment Strategy; Valuation and Catalysts for Healthcare Stocks; Our P+A Approach</b> John L. Sullivan CFA, Director of Research and Healthcare Investment Strategist, Leerink Swann Eric Varma, MD, Senior Biotechnology Research Associate, Leerink Swann
2:30	<b>Closing Comments</b>