

Bulletin

Physicians Caring for Our Community

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Job
Shadowing
in Clinical
Situations

GET READY FOR
FOUNDATION
FUNDRAISER
SEASON

Identity
& Asset
Protection

How LCMS Developed, Defended and Won
Approval of an FMA Resolution



BULLETIN

Lee County Medical Society is a Virtual Operation
Mailbox address: 5781 Lee Boulevard, Suite 208-104
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Lee County Medical Society Mission Statement

The mission of Lee County Medical Society is to advocate for physicians and their relationships with patients; promote public health and uphold the professionalism of the practice of medicine.

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*Members are encouraged to submit photos to be considered for the Bulletin cover.
Must be large format/300dpi. Email photos to marketing@lcmsfl.org*

NEW BACKGROUND SCREENING REQUIREMENTS

While many Florida-licensed physicians have previously submitted to the state's background screening requirements when applying for initial licensure, physicians licensed prior to January 2013 were exempt from this process. Effective July 1, 2025, HB 975 (2024) removes this exception and requires all physicians to complete electronic fingerprinting prior to their next license renewal.

CALENDAR OF EVENTS

FRI, SEP 12th
5:30pm - 7:30pm

LCMS Cocktail Hour
Host: Elmquist Eye Group
7970 Summerlin Lakes Dr.

THU, SEP 25th
6:00pm - 8:30pm

LCMS Foundation
13th Annual Medical Service Awards
Forest Country Club
6100 Club Blvd SW

SAT, SEP 27th
8:00am - 12:30pm

LCMS Foundation
3rd Annual Golf Tournament
Eastwood Golf Course
4600 Bruce Herd Ln.

WED, OCT 15th
11:30am - 1:00pm

LCMS Practice Administrators Luncheon
Location: Doubletree at Bell Tower
Sponsor: Markham Norton Mosteller & Wright

SAT, OCT 25th
7:30am - 10:30am

LCMS Foundation
Annual 5K Run/2K Walk
FSW Campus
8099 College Pkwy

THU, NOV 13th
6:30pm - 8:30pm

LCMS Member Meeting
FineMark National Bank & Trust
8695 College Pkwy.

RSVP to LCMS events at www.lcmsfl.org

NEW MEMBERS



Caleb E. Combs, MD
Psychiatry
Caleb Combs, M.D., PLLC
1322 SE 46th Lane, #201
Cape Coral, FL 33904
Practice: 786-475-2266
Fax: 843-484-3515
www.calebcombsmd.com



Alexander Herbst, MD
Dermatology
OnSpot Dermatology
13770 Plantation Rd., #103
Fort Myers, FL 33912
Practice: 941-444-0011
www.onspotdermatology.com



Mario Lopez, MD
Cardiology
Charlotte Heart & Vascular Center
1620 Tamiami Trail, Ste 308
Port Charlotte, FL 33948
Practice: 941-246-2482
Fax: 941-979-9074
www.charlotteheart.net



Jennifer Sherwin, MD
Pediatrics
Golisano Pediatrics
23450 Via Coconut Pt., Ste H
Estero, FL 34135
Practice: 239-343-9888
Fax: 239-343-4055
www.leehealth.org



Anisleidys Wesch, MD
Internal Medicine/Hospitalist
Millenium Physician Group
6321 Daniels Pkwy, Suite 200
Fort Myers, FL 33912
Practice: 855-674-7400
www.millenniumphysician.com

NEW FSU/LEE HEALTH RESIDENT MEMBERS, CLASS OF 2028

Family Medicine

Jessica Almaguer
Geraldine Lopez
Steven Paul
Justin Hover
Cynthia Maza Perez
Kate Fiddler
Katarzyna Leavitt
Nicole Outten
Qinjin Chen
Wamika Shoukat

Internal Medicine

Maria Azario
Zeiad Elgammal
Eric Figueroa
Dontreyl Holsey
Erin Igwacho
Guillermo Lopez Dominguez
Stefan Maksimovic
Stephanie McCarthy
Amanda Raymond
Tamara Raymond
Lorena Vadan
Anna Wilson
Elgammal Zeiad

MEMBER NEWS

RETIREMENTS

Dr. Frederick Brett Shannon, a Pediatric Orthopedic Surgeon, and founder of Pediatric Orthopedics of SWFL will retire on October 3, 2025. Dr. Shannon established the business in 1992 and was the region's first fellowship-trained specialist in the field. He has also been an LCMS member since 1992.

Dr. William Hearn, a Radiologist with Radiology Regional retired earlier this year.

Dr. Mai Saif retires from Florida Radiology Consultants in August.

NEW LOCATIONS

Dr. Ashley Pezzi, a Dermatologist with Precision Healthcare Specialists is accepting patients at these PHS locations:
9341 Marketplace Rd., Fort Myers, FL 33912
513 Cape Coral Pkwy West, Cape Coral, FL 33914
phone 239-291-3604 | fax 239-291-3605

Dr. Lea Blackwell and **Dr. David T. Rock** are accepting patients at Precision's new location 14440 Metropolis Ave.

NEWS MAKER

Congratulations to **Dr. Rebekah Bernard**, who was elected to the Florida Medical Association Board of Governors as Treasurer.

IN MEMORIAM

It is with deep sympathy that we announce the passing of:

Dr. Richard H. Davis
January 25, 1941 – July 8, 2025

JOIN A COMMITTEE

When you donate your time and talents to a professional organization, great things happen to all its members. First, your leadership skills and participation are valued. Second, you deepen your understanding of the medical community's culture and varying processes. And third, your investment helps strengthen the profession and those who rely on it.

Commitment levels and time donated are controlled by you. We are seeking physician volunteers for the following committees:

EVENTS MEMBERSHIP 2026 FMA DELEGATION

One-time volunteers are also needed to help us with event day-of operations, new member mentorship, membership mailings, and Directory deliveries. Contact LCMS Executive Director Julie Ramirez, CAE, at 239.936.1645 to discuss your interest in volunteering.

STRENGTHENING THE SOCIETY WITH NEW KEY COMMITTEES

PRESIDENT'S MESSAGE: Gamini Soori, MD, MBA, FACP, FRCP

We are in the midst of summer and well past the first half of a very active year at LCMS!

Your Society kicked off the year with a very successful Strategic Planning session, which created our agenda for the coming three years. Now we have a more organized and well-structured organization moving forwards, as we actively implement our Strategic Plan.

More notably, one of our strategic priorities is the expansion of our membership. We have created the **Membership Committee** dedicated to exploring ways to articulate the value proposition of LCMS, and recruit more members from practices large and small. Out of approximately 2,000+ licensed physicians in Lee County, only approximately 800 are active members in our Society. As the organization representing the physicians in our county, there is a huge opportunity for us to reach out to the non-member physicians and encourage them to be part of our Society. This is a responsibility of each member of our Society and using a well-familiar phrase, "Together We Are Stronger!" At the last Board Meeting we discussed ways in which we can share the ongoing activities of LCMS among the large body of potential future members and hopefully incentivize them to join us.

We also successfully launched a process of soliciting, discussing and promoting items of advocacy with our newly created **Resolutions Committee**. Our first resolution spearheaded by a LCMS member was discussed and presented at the recent FMA meeting in Orlando. After usual testimony for and against the Resolution and debate, it was successfully adopted by the FMA for further action. We want our members to bring actionable ideas for resolutions to be

discussed at our Resolution Committee during the year, well in advance of the next FMA annual meeting.



As most of you are aware, LCMS has a robust calendar of active events throughout the year. It is great to see how we are growing our existing programs and creating new ones in addition. In order to better operationalize this growing portfolio of activities, we have created an **Events Committee** charged with this continuing responsibility. Two activities coming around the corner that need mentioning are the Annual Medical Service Awards and the Third Annual LCMS Golf Tournament. Both these events are open to LCMS members as well as your family, friends and the general public. Please help us make these events super successful by actively soliciting others to attend as well. These events raise much-needed funds for our LCMS Foundation that supports the Physician Wellness Program.

The **Physician Wellness Program** continues to be a well-utilized service, which is a direct membership benefit for LCMS physicians and their families. It provides paid counseling services in a confidential manner for those who wish to avail themselves of such support. With increased fundraising, LCMS will be able to expand this service to many more physicians and we ask for your continued support.

We have a vibrant agenda and with your active involvement, support and input, we will continue to work with much enthusiasm and vigor in the coming months!

JULY 7TH RESIDENCY RECEPTION AT FINEMARK NATIONAL BANK & TRUST



Residency Reception: 2028 Family Medicine Class



Residency Reception: 2028 Internal Medicine Class

YOUR DELEGATION OBTAINED AN FMA RESOLUTION APPROVAL!

THE RAMIREZ REPORT: Julie Ramirez, CAE, LCMS Executive Director



Every July the Lee County Medical Society brings physician delegates to the Florida Medical Association House of Delegates to represent Lee County.

At this year's annual conference LCMS presented a resolution requested by one of our members. The resolution committee gathered via Zoom to discuss the proposed resolution, language was created, and the resolution was formally submitted to the FMA. After submission, the Lower West Coast Caucus discussed it at their annual Zoom meeting in the middle of July. Once at the House of Delegates, LCMS member and author, Dr. Viswanathan Chokkavelu, defended the resolution to the Reference Committee's four members. Three of the four physicians on the committee accepted it. After deliberations, the committee made this recommendation to the House of Delegates:

RESOLUTION 25-404: *Limitation on Disclosure of Medical Malpractice History, Lee County Medical Society Recommendation:*

Mr. Speaker, your Reference Committee recommends that Resolution 25-404 be amended by insertion and deletion. The original resolution reads as follows:

RESOLVED, that all relevant medical entities of the State of Florida—including, but not limited to, employers, hospitals, insurance providers, and legal or regulatory bodies—should limit requests for a physician's malpractice history to incidents occurring within the most recent ten (10) years.

The amended resolution reads as follows:

RESOLVED, that all relevant medical entities of the State of Florida—including, but not limited to, employers, hospitals, insurance providers, and legal or regulatory bodies—should limit requests for a physician's malpractice history to incidents, settlements and judgements attributable to the physician occurring within the most recent ten (10) years.

continued on page 10

JOB SHADOWING IN CLINICAL SETTINGS: OBSERVERS, VOLUNTEERS AND STUDENTS

by: Richard F. Cahill, JD, Vice President and Associate General Counsel, The Doctors Company

Healthcare practitioners often receive inquiries from students seeking opportunities to shadow or observe, volunteer, or learn through a formal clinical rotation. High schools may offer programs and courses that focus on careers related to medicine, dentistry, or nursing. The requests for shadowing experiences can also come from college and vocational students.

Understanding what being a healthcare professional entails is critical for any individual considering a career in the industry. Observing, volunteering, and mentoring opportunities may be rewarding for the professional and benefit the learner by fulfilling requisite application criteria. Although it is a great opportunity to promote your profession, it is also important to recognize the risks to your patients, employees, and your practice if you decide to accommodate such requests.

Before deciding to allow students into your office, explore their personal expectations as well as the impact it could have on your practice. Identify and validate the program associated with the inquiry and understand the objectives that are expected to be achieved. It is important for practitioners to differentiate between shadowing or observing, volunteering, and a formal clinical rotation in which direct patient care is provided.

Shadowing or Observing

A shadowing or observing experience allows an individual to watch a practitioner provide care to patients in a clinical setting. Shadowing experiences, which are generally used as an introduction to the profession, allow the practitioner to mentor and model professionalism in the care and treatment of patients who have various conditions. These situations also provide opportunities to demonstrate sensitive communications with patients from diverse social, cultural, educational, and financial backgrounds.

The observer may be associated with a formal school or vocational program. Often, shadowing a healthcare professional

is required as part of an application process to a formal educational program. In most cases, the individuals will not have a clinical instructor. These observational experiences are temporary, more informal, and do not involve direct patient care. To prevent harm, the practitioner should assess the observer's education, social skills, and training before deciding how the individual will interact with patients.

Volunteering

Volunteering is usually more structured than shadowing or observing. It does not, however, constitute education or training. Rather, volunteering provides unpaid experience in the clinical setting. Practices that accept volunteers should have defined processes and written protocols, which are periodically reassessed, and a clearly articulated role for the volunteer. Volunteering should include an application process and an orientation. Determine the exact duties the volunteer will execute during the time period, such as answering phones, filing, or other duties that are supervised but do not involve patient care.

Clinical Rotation

A clinical rotation is part of a formal education program for healthcare professionals. The learner rotates through various settings to gain hands-on patient care experience.

Clinical rotations are very structured. They include learning objectives, behavioral expectations, and a supervising clinical faculty member to offer guidance.

Depending on the type of program, the preceptor may be a nurse, advanced practice clinician, dentist, or physician approved by the education program's criteria. In such cases, the program usually has very structured objectives and approvals for practicum experiences. This type of rotation or preceptorship is reserved for students near the end of the formal training program. The practice should request and review any of the program's requirements or other documents that describe the relationship with the sponsoring practice and expectations for the practitioner and learner.



Risk Management Strategies

Regardless of the situation—shadowing or observing, volunteering, or clinical rotation—it is vital to safeguard patients’ rights, privacy, dignity, and confidentiality. It is also the sponsoring clinical practice’s responsibility to ensure that the learner is mature enough to understand the practice’s behavioral expectations. The practice must institute controls to protect patients, staff, and the practice.

- Consider the following strategies to help reduce the risks to your practice—including the risk of breaching patient confidentiality protected by federal and state privacy laws. These strategies may also help you identify the individual’s specific goals and objectives to make the experience mutually rewarding for the learner, patient, and practice.
- Ask for a formal written request for the learning experience that includes its length of time, purpose, objectives, and expectations. Requests for clinical rotations should also include a written contract with the educational institution that identifies liability responsibilities and outlines what to do if the student gets a needle stick, is exposed to bloodborne pathogens, or is otherwise injured on the property.
- Provide a brief application form or ask for a résumé that contains the learner’s personal information, including parent/guardian names and contact information, school name, current grade level, school contact (counselor/advisor/faculty), and the specific purpose of the experience.
- Learn about the program by interviewing the student. The interview will also provide an opportunity to assess the student’s level of maturity, intellect, personality, and communication skills.
- Request one or two references or recommendations from a faculty member or other individual who can confirm the student’s character and motivation.
- Consider a liability waiver or release form executed by the parents or guardian if the student is a minor or if the setting includes any hazards, such as exposure to chemicals, lasers, or biological substances.
- Limit student observers to those who attend a structured program that provides instructions regarding professionalism, confidentiality, office decorum, and compliance with applicable federal and state regulations.
- Create a name badge that identifies the learner’s role clearly for office staff and patients.

- Develop an introduction process and ask patients for permission prior to the encounter to allow the learner to observe the clinician-patient interaction. Inform patients that they may decline the request. Document patient consent in the patient’s record.
- Have the student (and the parent or legal guardian if the individual is a minor) sign a confidentiality agreement.
- Develop a “code of conduct” and review expectations with the student. At a minimum, it should include guidelines that address professionalism, abusive language, breach of confidentiality, harassment, appropriate use of mobile devices, office decorum, the use of social media, and dress code. The student should sign an agreement to abide by the code of conduct.
- Provide clear explanations regarding the appropriate time for questions and answers, such as during or after the interaction between the healthcare practitioner and the patient.
- Discuss infection control standards, including the necessity to stay home at the onset of symptoms of illness, and outline any mask mandates or other precautions in effect. Request a current TB skin test and proof of immunizations.
- Provide orientation to ensure that the student is prepared for the learning experience. The orientation should identify the professional mentor and outline the sponsoring practice’s expectations. It should also include training on HIPAA, universal precautions, and social media restrictions. Conduct periodic meetings with the individual to reassess knowledge of roles and responsibilities and document those meetings in administrative files in the event of a subsequent inquiry or adverse event.
- Verify with your agent or broker that appropriate insurance coverage is in place before providing shadowing or observing, volunteering, or clinical experiences in your practice.

For guidance and assistance in addressing any patient safety or risk management concerns, contact Patient Safety and Risk Management at (800) 421-2368 or by email.

Resources

- American Medical Association. *Code of Medical Ethics Opinion 3.1.2. [Patient privacy and outside observers to the clinical encounter.](#)*
- American Student Dental Association (ASDA) Blog. *Six ways shadowing prepares you for dental school.*
- Association of American Medical Colleges. *[Shadowing a doctor.](#)*

The guidelines suggested here are not rules, do not constitute legal advice, and do not ensure a successful outcome. The ultimate decision regarding the appropriateness of any treatment must be made by each healthcare provider considering the circumstances of the individual situation and in accordance with the laws of the jurisdiction in which the care is rendered. Reprinted with permission. ©2025 The Doctors Company (thedoctors.com)



New Location Ashley Pezzi, MD, FAAD

We're excited to welcome patients to
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Cape Coral, FL 33914

 ph: 239-291-3604
fax: 239-291-3605



Dr. Pezzi is a **board-certified dermatologist** dedicated to helping patients achieve healthy, confident skin. Known for her compassionate approach and advanced expertise, she provides **personalized care** using the **latest treatments**.

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PRECISION AT PHSPECIALISTS.COM

Protecting Your Identity and Other Assets

by: Pam Blackwell, Vice President, Private Client Relationship Manager, First Horizon

Identify theft is a crime that happens when someone uses a person's identifying information without authority. Criminals use many techniques to try to trick you into giving them personal information, including: phishing (email), vishing (phone), smishing (text), pharming (fake websites), skimming (credit card fraud).

Warning Signs of Identity Theft

Watch for unexpected transactions or communications that could indicate your identity has been stolen. Warning signs of identity theft include:

- Withdrawals from your bank account that you didn't make
- Missing bills and statements
- Merchants refusing your checks
- Credit card transactions that don't go through
- Letters about accounts you didn't open
- Emails about purchases you didn't make
- Statements for credit cards you don't have
- Debt collectors calling about debts that aren't yours
- Passwords or usernames that suddenly don't work
- Unfamiliar accounts on your credit reports
- Medical bills for services you didn't receive
- Health records for conditions you don't have
- The Internal Revenue Service (IRS) notifies you that more than one tax return was filed in your name, or that you have income from somewhere you never worked
- Notification about a data breach

Steps to Minimize Identity Theft

You can never completely eliminate all risks. However, you can take steps to minimize some of them:

- Guard your personal information closely. If someone asks for your Social Security number or other personal information, ask why they need it, how it will be used, how they will protect it, and what happens if you don't share it.
- Don't respond to unsolicited requests. They may be text messages, emails, or phone calls asking you for sensitive information, such as your Social Security Number or date of birth.
- Protect your mail. Your mail is often an easy target for an identity thief because you likely receive and send personal information that way.
- Sign up for direct deposit. This gives thieves less

access to your information because paychecks and checks for public benefits do not go through the mail.

- Clean up your financial trash. Destroy all pieces of paper containing your personal information before recycling them.
- Review your financial accounts regularly and carefully. Contact your financial institution immediately if there is a discrepancy in your records or if you notice something suspicious.
- Beware of identity theft on the Internet. Be cautious about providing bank account or other personal information online.
- Protect your devices, such as computers, phones, and tablets. Find more information on staying safe online at www.OnGuardOnline.gov, a Federal Trade Commission (FTC) resource.
- Review your credit reports at least once every 12 months. Carefully check your credit reports for activity you don't recognize. You can request a copy at www.annualcreditreport.com. Ordering your own credit reports does not affect your credit scores.
- Keep your important documents secure. This applies to both paper and electronic documents.
- Beware of disaster-related scams. Con artists take advantage of people after disasters by claiming to be from legitimate charitable organizations.
- Read scam alerts. The FTC maintains a running list of scams at www.consumer.ftc.gov/scam-alerts. You can report scams on the FTC site, too.

If you are a victim of identity theft, you should create an Identity Theft report with the FTC. Go to IdentityTheft.gov. Additionally, you can put a freeze on your credit reports to reduce the possibility of a thief opening a new account in your name. Be sure to do this with all three credit reporting agencies: experian.com/fraudalert; transunion.com/fraud; and equifax.com/creditreportassistance.

Insurance

Consider purchasing or reviewing your insurance policy's terms as it can reduce the financial impact of a loss or event covered by the insurance policy. Insurance is an important way to protect yourself from financial catastrophe. Purchasing insurance is about managing risks to your assets.

Keep Accurate Records

Be sure to keep a list of your assets. A great tool to help you develop an inventory list can be found at insureuonline.org. Document any damages and save receipts for related expenses. This means taking video or pictures of damage to your home, personal property, or vehicle. File claims if you've incurred a loss that you believe is covered by your insurance policy.

LCMS SUMMER EVENTS

From a well-attended Residency Reception (page 3) to the LCMS Delegation at the Florida Medical Association annual meeting (below), August cocktail hour (cover image), and Family Beach & Pool day (below), your association is working to keep you connected every month of the year.



2025 FMA Delegation Selfie



2025 FMA Delegation (l-r) Drs. Conrado, Dimas, Carrion, Khalil, Mirabeau-Beale, Caesar, Chokkavelu, Azam and Laufer



Families enjoyed games, bingo, burgers, hot dogs, watermelon and music until the rain stopped in time for a quick swim and ice cream!

RAMIREZ REPORT: RESOLUTION...continued from page 5

The Reference Committee reviewed the online testimony for the resolution, which was in favor of the resolution. The Committee agreed that it would be appropriate to limit the lookback period for medical malpractice history consistent with the language in the resolution and therefore supports adoption.

The Reference Committee heard testimony in favor of the resolution. Amongst other testimony in favor of the resolution, the Committee heard that there is no data suggesting that having medical malpractice history from physicians dating back beyond 10 years would be beneficial to patients or other entities. An amendment was preferred to modify the resolution to use more expansive language that would ensure that physicians named in settlements

do not have this information used against them. The Committee agreed with the amendment and voted to recommend that the resolution be adopted as amended. Once on the House floor on Sunday morning, the Committee Chair asked the House of Delegates if there were any abstractions needed for discussion. No resolution was abstracted and all resolutions passed as is, including the one authored by Lee County Medical Society. Congratulations!

Our LCMS resolution committee will entertain resolution proposals next spring in preparation of the 2026 FMA Annual Conference, July 31-Aug 2, 2026 in Orlando. All active physician members are welcome to join this committee.



2025 FOUNDATION FUNDRAISERS

LCMS Foundation fundraisers fuel the **Physician Wellness Program (PWP)**, which provides a safe harbor for active LCMS physicians to address normal life difficulties in a confidential and professional environment with a licensed psychologist. **This is a confidential and free member benefit. No insurance is billed** and LCMS is not given any personal information about those using the program. For 2025, LCMS members can access up to six (6) sessions, in person or virtually. Details on how to use or donate to this program can be found at www.lcmsfl.org/our-programs.

Individual member or allied business support through Foundation event partnerships show an investment in the medical community. All giving levels provide great opportunities to broaden market reach to the membership.

A Community Celebration

13th Annual Medical Service Awards

Thursday, September 25, 2025

cocktails & silent auction: 6:00pm - 7:00pm
dinner & program: 7:00pm - 9:30pm

Forest Country Club • 6100 Golf Club Blvd., SW • Fort Myers, FL 33908

3rd Annual

CHARITY GOLF TOURNAMENT

\$175
PER GOLFER

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SAT
27 SEPT 2025

Eastwood
Golf Course





5781 Lee Boulevard, Suite 208-104
Lehigh Acres, FL 33971

CHANGE SERVICE REQUESTED

SUPPORT THE FOUNDATION

Please consider participating in the upcoming Foundation fundraiser events. Proceeds from these events support your Physician Wellness Program. Many ways and levels you can give.

13th Annual Medical Service Awards

Thursday, September 25, 2025
The Forest Country Club

3rd Annual Golf Tournament

Saturday, September 27, 2025
Eastwood Golf Course

Annual 5K Run/2K Walk

Saturday, October 25, 2025
FSW College Campus
