



**Mayo Clinic School of Continuous
Professional Development**
200 First Street SW
Rochester, Minnesota 55905

July 28, 2026

Greetings,

On behalf of the Mayo Clinic School of Continuous Professional Development and Course Directors Irving A. Jorge, M.D., Devendra Joshi, M.B.B.S., M.D., and Megan H. Nelson, M.D., we hope you will consider a live exhibit opportunity at our **Mayo Clinic Advanced Cholecystectomy and Biliary Tract Stones 2027** continuing medical education activity that will be held January 15-16, 2027, at the Mayo Clinic Franke Education Center in Phoenix, Arizona. For your convenience, attached is the course program schedule which includes presentation topics and faculty listing. We expect approximately 50 general surgeons and surgical residents.

The Mayo Clinic Divisions of Gastroenterology and Surgical Specialties are pleased to offer this Advanced Cholecystectomy and Biliary Tract Stones 2-day program will review current approaches to biliary disease management, including diagnostic imaging, endoscopic and interventional therapies, and laparoscopic and robotic common bile duct exploration. Participants will learn evidence-based strategies for managing complex biliary conditions, preventing complications, improving patient outcomes, and developing successful biliary surgery programs.

The display fee to exhibit at the live course is **\$3,000**. Space at the live course is limited and tables will be reserved on a first-come, first-served basis based on the date the signed exhibit Letter of Agreement (LOA) letter is received in our office. To maintain a clear separation of promotion from education, all exhibits will be located in a space separate from where the general session is held. Exhibits are "open" from registration until the conclusion of the final lecture. Product theatre and other sponsorship options are listed on the Sponsorship Opportunities document

Live Exhibit Benefits:

- Promotion at the live two-day course
- Exhibitors are provided the same meals and beverages provided to registered attendees
- Attendees are encouraged daily by the course moderator to visit and connect with the exhibitors
- Includes a 6ft table with two chairs
- An attendee list including: registered attendee's name, degree, city and state distributed a week before the course.
- Vendor recognition in online course syllabus
- Acknowledgement on rolling announcements during the course and on signage at the course

If you are interested in participating in this course, please complete the electronic [Letter of Agreement Form](#). If you have not already done so, please [create an account](#) prior to signing our letter of agreement.

Mayo Clinic's Tax ID number is 86-0800150; our W-9 form is attached for your convenience.

Mayo Clinic, an integrated, not-for-profit group practice, is committed to meeting its responsibility as a national medical education resource. In support of improving patient care, Mayo Clinic College of Medicine and Science is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME), the Accreditation Council for Pharmacy Education (ACPE), and the American Nurses Credentialing Center (ANCC) to provide continuing education for the healthcare team. Our programs provide valuable information on unmet needs to the medical community. We sincerely appreciate your consideration and hope you will take the opportunity to join us for a truly unique educational program

We appreciate your consideration of this opportunity and hope to see you in January in Phoenix!

Sincerely,

Allison Garvey / CME Specialist Garvey.Allison@mayo.edu

Addie Graves / Education Administration Coordinator Graves.Addison@mayo.edu

**Mayo Clinic School of Continuous Professional Development (MCSCPD)
Sponsorship Opportunities**

<u>Opportunity</u>	<u>Cost</u>
Non-CME Product Theatre (Sponsor-provided, product offerings; limited to two organizations) These non-accredited programs, independently developed and directly sponsored by industry, are presented in an educational format that will provide insight on new or controversial developments. Product theatre may not conflict with course content. 60-minute luncheon session with complimentary meeting room space. Food and beverages will be provided by Mayo Clinic. Sponsor will be responsible for the following: Sponsor is responsible for providing speaker(s), program invitations and advertisements for the product theatre. Sponsor is logistically and financially responsible for any/all audiovisual needs for the product theatre.	\$12,000
Lanyards (Sponsor-provided, pre-printed lanyards; limited to one organization) Every attendee is required to wear a name badge, so what better way to advertise your company than with your logo on a lanyard! (Quantity to be determined 60 days before course.)	\$2,000
Conference Bags (Sponsor-provided, pre-printed drawstring bags; limited to one organization) Help keep course attendees organized by providing them with a drawstring bag to carry their course materials in with your company's logo on it! Drawstring bags to be provided by sponsor; artwork and bag are subject to MCSCPD approval. (Quantity to be determined 60 days before course.)	\$3,000
Conference Bag Inserts (Multiple opportunities available) Conference bag inserts are a great opportunity to invite attendees to your booth, announce your booth participation or conference- related event. Your company will provide copies of the flyer or advertisement (no larger than 8 ½ x 11, no more than one page) and the MCSCPD will stuff them into the official conference bags. A limited number of bag inserts are permitted, so early reservation is encouraged. Artwork is subject to MCSCPD approval. (Quantity of fliers/advertisements to be determined 60 days before course.)	\$1,500 each

If you are interested in participating in any of these sponsorship opportunities, please complete the electronic [Exhibitor Letter of Agreement](#) and contact Addie Graves at Graves.Addison@mayo.edu.

**Request for Taxpayer
Identification Number and Certification**

Go to www.irs.gov/FormW9 for instructions and the latest information.

**Give form to the
requester. Do not
send to the IRS.**

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) Mayo Clinic Arizona	
	2 Business name/disregarded entity name, if different from above.	
	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. ☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate ☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____ Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. ☒ Other (see instructions) 501 (c) (3) Tax-exempt Nonprofit Corporation	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) 1 Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) A (Applies to accounts maintained outside the United States.)
	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions ☐	
	5 Address (number, street, and apt. or suite no.). See instructions. 13400 East Shea Boulevard	Requester's name and address (optional)
6 City, state, and ZIP code Scottsdale, AZ 85259		
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number										
			-				-			
or										
Employer identification number										
8	6		-	0	8	0	0	1	5	0

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person <i>Katy Domaille</i>	Date <i>1/2/2026</i>
------------------	--	-------------------------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they



School of Continuous
Professional
Development

Mayo Clinic Advanced Cholecystectomy and Biliary Tract Stones 2027



January 15-16, 2027

MAKE PLANS TO ATTEND!

Mayo Clinic Franke Education Center
Phoenix, Arizona



Save the date

ce.mayo.edu/bileduct2027



Mayo Clinic Advanced Cholecystectomy and Biliary Tract Stones 2027

COURSE DIRECTORS

Irving A. Jorge, M.D.

Megan H. Nelson, M.D.



Mayo Clinic School of Continuous Professional Development

ce.mayo.edu | cme@mayo.edu | 800-323-2688

Imagery is copyright Mayo Clinic, Getty Images, Shutterstock or approved for use.

©2025 Mayo Foundation for Medical Education and Research.

MC8200-122SVD

Mayo Clinic
5951 East Mayo Boulevard
Phoenix, AZ 85054

ELECTRONIC SERVICE REQUESTED



JANUARY 15-16, 2027

**Mayo Clinic Franke Education Center
Phoenix, Arizona**

ce.mayo.edu/bileduct2027

NON-PROFIT ORG.
U.S. POSTAGE
PAID
MAYO CLINIC

Advanced Cholecystectomy and Biliary Tract Stones 2027	
Mayo Clinic Phoenix, Arizona	
Franke Education Center & Waugh Auditorium	
January 15-16, 2027	
Day 1	Friday, January 15, 2027
7:00 AM	Registration, Continental Breakfast, and Exhibits
8:00 AM	Welcome and Introductions Irving A. Jorge, M.D.
Session I: Biliary Imaging Moderator: Motoyo Yano, M.D., Ph.D.	
8:20 AM	Pre-Operative Biliary Ultrasound & HIDA Scans Maitray D. Patel, M.D.
8:40 AM	CT Scan in Cholecystitis Motoyo Yano, M.D., Ph.D.
9:00 AM	Biliary Tract MRCP Motoyo Yano, M.D., Ph.D.
9:20 AM	Introduction to Fluoroscopy and Cholangiograms Matthew B. Bloom, M.D.
9:40 AM	Intraoperative Ultrasound Steven P. Bowers, M.D.
10:00 AM	Panel Discussion and Q&A Session Faculty
10:30 AM	AM Break & Exhibits
Session II: Multi-Disciplinary Approach to The Complex Patient Moderator: TBC	
10:30 AM	Role of ERCP in Complex Biliary Stone Management and Endoscopic Alternatives in the Non-Surgical Patients TBC
10:50 AM	Cholecystostomy Tubes Management and IR Options for Non-Surgical Patients Alex Wallace, M.D.
11:10 AM	Cholecystitis in Cirrhotics Blanca C. Lizaola-Mayo, M.D.
11:40 AM	Panel Discussion and Q&A Session Presenters
12:10 PM	Lunch & Exhibits
12:10 PM	Optional Product Theater: Company 1 (no CME credit) Location:

Session III: CBDE Moderator: Devendra C. Joshi, M.B.B.S., M.D.	
1:10 PM	Step-up Approach to CBDE TBC
1:35 PM	Balloons and Wires - Then, When and Hows TBC
1:50 PM	Choledochoscopy - Then, When and Hows TBC
2:10 PM	Comlications TBC
2:30 PM	Panel Discussion and Q&A Session Faculty
2:50 PM	Recap
3:10 PM	Adjourn

Day 2	Saturday, January 16, 2027
7:15 AM	Breakfast & Exhibits
7:55 AM	Announcements
Session IV: Finance Moderator: TBC	
8:00 AM	Evidence Behind CBDE, Building Your Program and Value Analysis TBC
8:20 AM	Presenting Your Case Simulation: Shark Tank with the C-suite! TBC
8:50 AM	Shark Tank Debrief and Securing Support from the C-suite TBC
9:20 AM	Panel Discussion and Q&A TBC
9:50 AM	Break and Exhibits
Session V: Safe Chole Moderator: Irving A. Jorge, M.D.	

10:20 AM	Preserving the Bile Duct in Challenging Gallbladders Irving A. Jorge, M.D.
10:40 AM	Evaluation and Management of Gallbladder Polyps and Incidental Cancer During Cholecystectomy TBC
11:00 AM	Robotic IOC, CBDE, US TBC
11:30 AM	Panel Discussion and Q&A Session Presenters
12:00 PM	Lunch and Exhibits
12:10 PM	Optional Product Theater: Company 2 (no CME credit) Location:
Session VI: Simulation Sessions Moderator:	
1:00 PM	Choledocoscopy 1 Faculty: Megan H. Nelson, M.D., Pei-Wen Lim, M.D., Devendra Chandra Joshi, M.B.B.S., M.D., Irving A. Jorge, M.D., Zhi Ven Fong, M.D., Dr.PH., Pete F. Johnston, M.D., Steven P. Bowers, M.D., Maggie E. Bosley, M.D., and Matthew B. Bloom, M.D.
1:25 PM	Choledocoscopy 2 Faculty: Megan H. Nelson, M.D., Pei-Wen Lim, M.D., Devendra Chandra Joshi, M.B.B.S., M.D., Irving A. Jorge, M.D., Zhi Ven Fong, M.D., Dr.PH., Pete F. Johnston, M.D., Steven P. Bowers, M.D., Maggie E. Bosley, M.D., and Matthew B. Bloom, M.D.
1:50 PM	Choledocoscopy 3 Faculty: Megan H. Nelson, M.D., Pei-Wen Lim, M.D., Devendra Chandra Joshi, M.B.B.S., M.D., Irving A. Jorge, M.D., Zhi Ven Fong, M.D., Dr.PH., Pete F. Johnston, M.D., Steven P. Bowers, M.D., Maggie E. Bosley, M.D., and Matthew B. Bloom, M.D.
2:15 PM	TBC TBC
2:40 PM	Wires and Balloons Faculty: Megan H. Nelson, M.D., Pei-Wen Lim, M.D., Devendra Chandra Joshi, M.B.B.S., M.D., Irving A. Jorge, M.D., Zhi Ven Fong, M.D., Dr.PH., Pete F. Johnston, M.D., Steven P. Bowers, M.D., Maggie E. Bosley, M.D., and Matthew B. Bloom, M.D.
3:05 PM	Robotic 1

	Faculty: Megan H. Nelson, M.D., Pei-Wen Lim, M.D., Devendra Chandra Joshi, M.B.B.S., M.D., Irving A. Jorge, M.D., Zhi Ven Fong, M.D., Dr.PH., Pete F. Johnston, M.D., Steven P. Bowers, M.D., Maggie E. Bosley, M.D., and Matthew B. Bloom, M.D.
3:30 PM	Ultrasound 1 Faculty: Megan H. Nelson, M.D., Pei-Wen Lim, M.D., Devendra Chandra Joshi, M.B.B.S., M.D., Irving A. Jorge, M.D., Zhi Ven Fong, M.D., Dr.PH., Pete F. Johnston, M.D., Steven P. Bowers, M.D., Maggie E. Bosley, M.D., and Matthew B. Bloom, M.D.
3:55 PM	Session Debrief Session Faculty
4:20 PM	Adjourn