GROUP VISIT TOOLKIT

Advanced Prevention for Cardiovascular Disease

Improve the health of your patients with meaningful information

- Easy to implement
- Cost-effective
- Time-efficient
- Insurance-friendly

FOR ADDITIONAL GROUP VISIT RESOURCES, VISIT LifestyleMatrix.com
Your patients want to change… now you have the tools

This toolkit explores how lipids, inflammation, genetics and lifestyle contribute to atherogenesis and CVD development. Education on the benefits of lipoprotein testing and proven nutrition and exercise advice help patients understand an advanced prevention approach to CV risk.

Use for patients with these issues:

- Hyperlipidemia
- Hypertriglyceridemia
- Low HDL
- CAD/CVD/CHD
- Diabetes/Prediabetes
- Hypertension
- Metabolic Syndrome
- Peripheral Vascular Disease

THIS GROUP VISIT TOOLKIT INCLUDES:

Visit Forms:
Patient intake forms are designed to capture key information to create efficient, insurance-friendly patient encounters.

Patient Handout(s):
Patient-friendly handout(s) assist you and improve the implementation of key lifestyle tips necessary to correct underlying causes of illness.

Multi-Media Education:
Choose the format to best suit your presentation style
- Video + audio version
- Presentation slides for custom education
Ideal use for a Group Visit or one-on-one setting

Shilpa P. Saxena, MD is a Board-Certified Family Practice physician whose passion and purpose come to life through sharing her innovative patient education and practice management solutions in her classic ‘keep it simple’ style. She serves as Faculty with the Institute for Functional Medicine, the Arizona Center for Integrative Medicine, the University of Miami, Miller School of Medicine, and the Metabolic Medical Institute at George Washington University. Dr. Saxena is an expert in the Group Visit medical model, creator of Group Visit Toolkits, and co-author of The Ingredients Matter: India.

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Patient Name: ______________________________ Date of visit: ______________________________

I understand as a participant in this Group Visit/Shared Medical Appointment, that I and other patients will discuss medical information in the presence of other patients, people, staff, and the clinician. If I have medical concerns that are of a very private nature, I will request to discuss with the clinician in a private setting or will schedule an individual office visit. I will also respect the confidentiality of the other members of the group by not revealing medical, personal, or any other identifying information about others in attendance after the session is over.

CC:  □ Hyperlipidemia  □ Hypertriglyceridemia  □ Low HDL  □ Hypercholesterolemia
□ Other: __________________________

History of Present Illness - Part I  (please complete all sections that apply)

1. Date (or Year) of diagnosis: ________________ or  □ Unknown
2. Worsening Factors: (check all that apply)
   - Current Prediabetes, Insulin Resistance, or Diabetes
   - Current Smoker or History of Smoking in last 5 years
   - Current High Blood Pressure
   - Sedentary lifestyle (no regular exercise activities)
3. Are You Taking Cholesterol Medication(s) as Prescribed?
   - 100% of the time
   - Sometimes: ______ % of the time
   - Never
   - I do not take cholesterol medication
4. Do you experience any side effects of the medication?
   - Muscle pain
   - Right upper abdominal pain
   - Liver issues
   - Other __________________________

Laboratory Review  (office use)

- Date of last lipid panel:
  - LDL-c _______________
  - HDL-c _______________
  - Triglycerides _______________
  - Non-HDL _______________
  - Total Chol _______________

History of lipoprotein testing:
□ Yes  □ No
Date of last: _______________

Current Lifestyle: History of Present Illness - Part II

1. Tobacco use?  _____ cigarettes/cigars per day
2. Alcohol use?  _____ drinks per week. Most number of drinks in a given day: _____
3. Caffeine intake?  _____ caffeinated beverages per day (include coffee, sodas, energy drinks, etc)
4. Water intake?  _____ glasses per day
5. Exercise?  □ Yes  □ No
   - Type of Exercise
     □ Walk
     □ Run, Jog, Bike, other aerobic
     □ Weight lifting
   - Length of Exercise Session
     □ > 45 min  □ 30-45 min  □ < 30 min
     □ > 45 min  □ 30-45 min  □ < 30 min
6. Nutrition & Diet
   - How often do you eat these foods in a given WEEK?
     - Choose from: (4) Daily  (3) Several times per week  (2) Once a week or less  (1) Never
     | Food                              | (4) Daily | (3) Several times per week | (2) Once a week or less | (1) Never |
     |-----------------------------------|-----------|---------------------------|------------------------|-----------|
     | Red meat                          |           |                           |                        |           |
     | Cheese/Dairy                      |           |                           |                        |           |
     | Fast Food                         |           |                           |                        |           |
     | Restaurant Food                   |           |                           |                        |           |
     | Processed carbs (bread, pasta, etc) |         |                           |                        |           |
     | Sweets                            |           |                           |                        |           |
Review of Systems: (check all that apply)
- Fatigue
- Palpitations
- Shortness of breath
- Weight gain (____ lbs last 3 months)
- Weight loss (_____ lbs last 3 months)
- Chest pain on exertion
- Swelling in ankles/legs
- High stress
- Calf pain with walking short distance

Past Medical History: (check all that apply)
- PERSONAL History of Stroke
- PERSONAL History of Heart Attack/Stent/Bypass Surgery
- FAMILY History of Stroke/Heart Attack/Stent (in parent/sibling/aunt/uncle/grandparent before 65 years old)
- None of the above

Exam:
- CV: R R R; no M/G/R Abnl: ______________ Edema: Yes / No JVD: Yes / No
- Respiratory: CTA B Abnl: ______________ Respiratory Effort: Nl Other:

Assessment: circle response
- Dyslipidemia controlled uncontrolled
- Other:

Plan of Care:
- Education on cholesterol
- Education on lipoproteins
- Education on hsCRP, apoB, apoE, homocysteine, Lp(a)
- Avoid saturated fats and trans fats
- Education materials regarding ‘good fats’ and ‘bad fats’ provided
- Achieve/maintain optimal weight
- Directed to take medication/nutritional support as prescribed
- Repeat diagnosis-specific labs in ____ months
- Order lipoprotein testing for further risk assessment
- Changes to medications/nutritional support include:

Setting and Managing Your Goals
There is so much wisdom in the old saying, “you can’t change what you can’t measure”. Often the simple act of writing down your goals allows you to keep them in the forefront of your lifestyle. Use the chart below to determine the goals you wish to achieve and track your success as you make changes and improve your health. You may even wish to track your lifestyle changes on a weekly basis, moving items from one column to the next to achieve success!

<table>
<thead>
<tr>
<th>GOALS I WISH TO ACHIEVE</th>
<th>WHAT I AM ACTIVELY CHANGING</th>
<th>WHAT I HAVE ACCOMPLISHED</th>
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<tbody>
<tr>
<td>1.</td>
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Advanced Prevention for Cardiovascular Disease

Each year, 1 in every 4 deaths in the United States will be from heart disease. It is the leading cause of death for both men and women, and nearly half of the American population has at least one risk factor for heart disease.

If you believe prevention is your best strategy, then you must identify the earliest signs of heart disease and take immediate action to reverse the course before a problem develops.

Join us as we teach you the latest in advanced lifestyle medicine, using specialized risk assessments and effective options beyond standard cholesterol medications.

Take control of your heart health today!

Register for our upcoming patient Group Visit:

Event Flyer

- Market to office patients
- Market to the greater community
- Customizable Word format

LOGO AREA

Date/Time/Location
PowerPoint Slides

- Concepts reviewed in video
- PPT slide files for clinician to present and modify as needed
- Handouts for patients
CARDIOVASCULAR DISEASE

Unstable Plaque

Many factors lead to the eruption...

You have control over many of them

IT'S PREVENTABLE

IT'S PREVENTABLE

Life’s Simple 7

My Life Check was designed by the American Heart Association with the goal of improved health by empowering the public on how best to live. These measures have one unique thing in common: any person can make these changes, the steps are not expensive to take and even modest improvements to your health will make a big difference. Start with one or two. This simple, seven-step plan has been developed to deliver on the hope we all have-to live a long, productive healthy life.

- Get Active
- Control Cholesterol
- Eat Better
- Manage Blood Pressure
- Lose Weight
- Reduce Blood Sugar
- Stop Smoking
- Manage Stress

GET HEALTHY – START NOW

“Everything should be made as simple as possible, but not simpler.”
Albert Einstein
Patients Powered by Knowledge

- Cholesterol is not bad:
  Bad cholesterol is bad.

- Total cholesterol = Good + Bad
- LDL = “Lousy” cholesterol
- Triglycerides = “Terrible”
- HDL = “Healthy, Helpful” cholesterol

BUT...

50% of heart attack victims had normal cholesterol levels

BUT...

50% of heart attack victims had normal cholesterol levels
Unique Lipoproteins Are Formed Based on What’s Inside

Apolipoprotein A1 (HDL) or B100 (LDL)

Triglyceride

Cholesterol Ester

Phospholipid

Unesterified Cholesterol

Most Labs Measure Cholesterol

<table>
<thead>
<tr>
<th>TEST DESCRIPTION</th>
<th>OUT-OF-RANGE</th>
<th>IN-RANGE</th>
<th>UNITS</th>
<th>EXPECTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lipid Panel</td>
<td>228</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Lipid Panel</td>
<td>38</td>
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<tr>
<td>Lipid Panel</td>
<td>95</td>
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<tr>
<td>Lipid Panel</td>
<td>151</td>
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</table>

Standard lipid panels are only markers for true LDL particle numbers.
Water Balloons Better Reveal Your Risk

Specialized lipoprotein tests that look at “water balloons” can give you hidden details not seen in your cholesterol panel.

Atherogenic Particles (heart disease-causing water balloons)
- VLDL
- VLDL_{H}
- IDL
- LDL
- HDL_{LDL}

very low density
intermediate density
small density

Atherosclerosis: An Inflammatory Disease
1. Damage Lining

It’s more like a volcano eruption.
Advanced Prevention Markers

Insulin Resistance

It's another hidden, yet common, cause of heart disease.
- Blood sugar
- Blood pressure
- Insulin levels
- Lipoproteins
- Obesity

Lifestyle and Genes: It's Simple Math

More Risk
More Disease
Poor Quality of Life

Less Risk
Less Disease
More Quality of Life

Lifestyle and Genes:

POOR LIFESTYLE + YOUR GENES =
- More Risk
- More Disease
- Poor Quality of Life

GOOD LIFESTYLE + YOUR GENES =
- Less Risk
- Less Disease
- More Quality of Life

4 STEPS for Cardiovascular Prevention AND Treatment
1. Determine your risk
2. Set personalized targets
   - Weight
   - Blood sugar & insulin
   - Lipids
3. Implement lifestyle medicine
4. Track your progress

CHOICES for Cardiovascular Prevention AND Treatment
1. Increase dietary fiber
2. Eat colorful plant foods
3. Use healthier oils
4. Eliminate all trans fats

GO for Fiber & Phytonutrients
GO for the GOOD Fats

- Consume High Quality Omega 3’s (GOOD fats)
- Use olive or coconut oil (GOOD fats)
- Go light on meats & dairy

Eliminate Trans Fats
Similar to Saturated Fat....

↑ LDL (bad cholesterol)

Worse than Saturated Fat....

↓ HDL (good cholesterol)

Wisdom is information in practice

GROUP VISIT
Advanced Prevention for Cardiovascular Disease
After learning about cholesterol and its role in cardiovascular disease, you now understand how your total cholesterol result does not provide accurate information about your risk for heart attack or stroke. In fact, even a standard cholesterol or lipid lab panel (total cholesterol, LDL, HDL, triglycerides) may not reveal all important risk factors.

In the Advanced Prevention for Cardiovascular Disease presentation, you learned about additional tests that can provide additional information regarding your risk for heart disease or stroke. Below are key learning points to help you with your Advanced Prevention goals.

- **Apolipoprotein B (apo B)**
  - Better risk predictor of heart disease
  - Represents total atherogenic particles

- **Very Low Density Lipoprotein (VLDL)**
  - Main carrier for triglycerides
  - Independent risk factor

- **LpPLA2**
  - Indicates inflammation
  - May indicate risk for plaque rupture

- **hsCRP**
  - Marker of cardiac inflammation
  - Useful if no other inflammation present

- **Apolipoprotein E (apo E)**
  - Genetic part of the lipoprotein
  - 6 different combinations (E2,E3,E4)
  - Different combinations require unique lifestyle recommendations

- **Lipoprotein (a)/ Lp(a)**
  - Inherited risk factor
  - Indicates pro-clotting

Office Name  |  Address  |  City, State  |  ZIP  |  Phone  |  Fax
## Advanced Prevention for Cardiovascular Disease

**Know Your Serving Sizes**

<table>
<thead>
<tr>
<th>Serving Size</th>
<th>Examples of Foods</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>deck of cards</strong> 3 oz</td>
<td>beef/steak, chicken, pork/ham, lamb, tuna, tofu, veggie burger</td>
</tr>
<tr>
<td><strong>checkbook</strong> 3 oz fish</td>
<td>salmon filet, flounder filet, halibut filet, cod filet, tilapia filet</td>
</tr>
<tr>
<td><strong>tennis ball</strong> 1 cup</td>
<td>Whole tennis ball (1 cup): apple, blueberries, cherries, orange, pear, 2 tangerines, 2 plums, 3 apricots. Half tennis ball (1/2 cup): beans (black, lentil, etc), butternut/acorn squash, corn, cottage cheese, oatmeal, pasta, rice, greek yogurt</td>
</tr>
<tr>
<td><strong>golf ball</strong> 2 tablespoons</td>
<td>Whole golf ball (2 Tbl): almonds, avocado, cashews, hummus, peanuts, pistachios, sunflower seeds, walnuts. Half golf ball (1 Tbl): almond butter, cashew butter, peanut butter</td>
</tr>
<tr>
<td><strong>domino</strong> 1 ounce</td>
<td>cheddar cheese, colby/jack cheese, parmsesan cheese, swiss cheese</td>
</tr>
<tr>
<td><strong>die</strong> 1 teaspoon</td>
<td>oils (canola, grapeseed, olive, sesame, etc), ghee, Smart Balance™/Earth Balance™ butter substitute (1.5 tsp)</td>
</tr>
</tbody>
</table>
### Concentrated Protein
3-4 oz, 150 calories
- 2 whole eggs or 3 whites + 1 whole
- Egg Substitute (2/3 cup)
- Fish or shellfish
- Poultry: chicken, turkey (white meat)
- Lamb: leg or lean roast
- Beef: very lean
- Pork: white meat
- Wild game: buffalo, venison, elk
- Tofu
- Semi-soft/hard cheese 1%-2% (1-2 oz)
- Greek Yogurt: plain unsweetened

### Fruit
80 calories
- Apple (1 medium)
- Apricots (3 medium)
- Berries: blackberries/blueberries (1 cup)
- Cantaloupe (¼ cup)
- Cherries (15)
- Figs (2)
- Grapes (15)
- Honeydew (¼ cup)
- Mango (¼ cup)
- Orange (1 large)
- Peaches/nectarines (2 small)
- Pear (1 medium)
- Persimmon (½ medium)
- Tangerines (2 small)

### Grains
Limit to 1 serving daily
75-110 calories
- Whole wheat bread (1 slice)*
- Whole wheat tortilla or pita (½)*
- Whole wheat pasta (¼ cup)*
- Ryvita or Wasa crackers (2 large)*
- Barley (½ cup cooked)*
- Bulgur cracked wheat (¼ cup)*
- Whole oats (¼ cup cooked)

**Gluten-Free Options:**
- Buckwheat groats (¼ cup)
- Rice, brown or wild (¼ cup)
- Quinoa or quinoa pasta (½ cup)
- Udi’s gluten-free bread (1 slice)

* Depending on your condition, your practitioner may recommend avoiding gluten-containing foods

### Nuts & Seeds
100 calories
- Almonds, hazelnuts (12 whole)
- Cashews (8 whole)
- Peanuts (18 whole)
- Walnuts, pecans (8 halves)
- Other nuts/seeds:
  - Pistachio, pumpkin, sunflower, sesame, pinenuts (2 Tbs)
- Nut butter (1 Tbs)
- Chia seeds, ground flax seeds

### Legumes
110 calories
- Beans (½ cup):
  - black, cannellini, garbanzo
  - kidney, lentil, lima, mung, navy, green peas, pinto, refried, soy (edamame)
- Hummus (¼ cup)
- Bean soup (¼ cup)

### Dairy & Alternatives
80 calories
- Almond milk, unsweetened (8 oz)
- Milk, 1%-2% (6 oz)
- Soymilk, plain (8 oz)
- Soy yogurt, plain/unsweetened (4 oz)
- Sour cream, nonfat (6 Tbs)

### Unlimited Vegetables

### Limited Vegetables
45 calories
- Beets or winter squashes (½ cup)
- Carrots (2 med or 12 baby)
- Sweet potato (½ medium)
- Yucon gold or red potato (½ medium)

### Fats
40 calories
- Oils:
  - Cold-pressed, extra-virgin olive, coconut, avocado oil (1 tsp)
  - Smart or Earth Balance (1½ tsp)
  - Ghee: clarified butter (1 tsp)
- Avocado (1/8)
- Olives (8-10 medium)
- Coconut milk, light (3 Tbs)

### Fluid goal (oz):

---

**Bolded Oils have higher smoke point, thus are more stable for high-temperature cooking**
FAT:
- 20-25% of diet should come from good fats and oils
- Good fats: avocado, olives, coconut, fish
- Good oils: Cold-pressed, extra-virgin olive, grapeseed, avocado, organic non-GMO canola
- Never heat sesame oil
- Limit saturated fats (go light on fatty meats and full fat dairy)
- Avoid trans fats entirely (stick margarine, Crisco shortening)
- Use coconut oil spray (from health food store) for eggs and sautéing

CARBOHYDRATES & SUGAR:
- Good rule of thumb: No more than 30 carbs per meal
- The lower glycemic, the better
- Get most of your carbohydrates from whole grains, fruits and vegetables
- No more than 5g of sugar per snack

SODIUM:
- Sodium restriction goal is <2000mg
- Celtic sea salt and Kosher salt are better than table salt
- Canned, processed and frozen foods are usually high sodium
- Restaurant foods often have the highest sodium content

INGREDIENTS TO AVOID:
- Refined grains including wheat, white rice, oats, corn, potatoes
- Hydrogenated and partially hydrogenated oils
- High fructose corn syrup
- Artificial sweeteners (Splenda – sucralose, Equal – aspartame)
- Ingredients you can’t pronounce or that sound like chemicals

SIMPLE STEPS TO EVALUATE A LABEL:
- Understand the serving size
- Calories: ~100-200 cal per snack / 350-600 cal per meal
- Fat: No trans fat/very limited saturated fat
- The first 4 ingredients should not contain a high glycemic starch or sugar (flour, rice, potato, corn, sugar, etc)
- The less ingredients, the better
Now that you’re on the path to a new, healthier you, here are five simple steps to get moving!

Starting a fitness program may be one of the best things you can do for your health. Physical activity reduces your risk of chronic diseases like diabetes, heart disease, arthritis and more. Additionally, moderate and consistent exercise can improve your balance and coordination, help you sleep better, manage your weight and improve your self-esteem. You can get started in just five simple steps, but be sure your physician clears you to get going.

**Step 1: Determine your level of fitness**

You probably have some idea of how fit you are. But assessing and recording baseline fitness scores can give you benchmarks to measure your progress. To assess your aerobic and muscular fitness, flexibility and body composition, consider recording:

- Your pulse before and after you walk 1 mile
- How long it takes you to walk 1 mile
- How many push-ups you can do in one session
- How many sit-ups you can do at one sitting
- How far you can reach forward while seated on the floor with your legs extended in front

**Step 2: Design your fitness program**

It’s easy to say that you’ll exercise every day. But you’ll need a plan. As you design your fitness program, keep these points in mind:

- **Know yourself** Are you starting a fitness program to help lose weight? Or do you have another motivation, such as preparing for a marathon? Having clear goals can help you gauge your progress. Also, know what type of environment you do best in. Some people love the gym or group fitness environment while others prefer to ‘walk alone’ or use video workouts.

- **Set your goal** Most adults should aim for at least 150 minutes of moderate-intensity aerobic activity — or 75 minutes of vigorous aerobic activity — a week. Adults also need two or more days of strength training a week.

- **Ease in** Work with your physician to gauge what level to start. Then, gradually increase your exercise intensity, strength and endurance. Then start cautiously and progress slowly. If you have an injury or a medical condition, consult your physician or a physical therapist for help designing a fitness program that best suits your needs.

- **Book it!** Finding time to exercise can be a challenge – it’s the main reason people avoid exercise. Truth is, you just need to prioritize and schedule it. That’s right, we suggest you schedule time to exercise as you would any other appointment. Other ideas include watching your favorite show while walking on the treadmill, reading while riding a stationary bike, or listening to books on your digital audio device while walking outdoors. A great song list can really help pass the time during a strength training workout.
• **Crosstrain** To keep you and your muscles from getting bored, change it up! (Cross training also reduces your chances of injuring or overusing one specific muscle or joint). Plan to alternate among activities that emphasize different parts of your body, such as walking, swimming, strength training and yoga.

• **Pace yourself** Many people start an exercise program in a frenzy — working out too long or too intensely — and give up when their muscles and joints become sore or injured. Alternate cardio and strength training to build muscle mass, not injure it. Rest and recovery are essential.

• **Share it** Tell your exercise plan to friends and family. Ask them to assist with your motivation and keep you going. But this plan goes both ways-don’t get upset with your loved ones when they try to motivate you. Also, a shared, written plan can also encourage you to stay on track. When you share any exercise goals, you’re more likely to stick with it.

**Step 3: Prepare your equipment**

If you’re planning to join a gym facility, this step is pretty easy. Visit more than one establishment and find your best fit. If you’re interested in exercise classes, make sure their schedule works for you. Ask about their busy times and determine if it matches your schedule. Also, many gyms include one or two personal training sessions to get you acquainted with the machines or the types of exercises you should expect in a class.

Fitness videos are also another popular way to fit exercise into your daily life without leaving home. Choose videos that provide exercise at your level and not too far above, as injury may occur. Consider trying something new—who knows, you just might love Zumba™. You may also need new athletic shoes. Be sure to pick shoes designed for the activity you have in mind.

If you’re planning to invest in exercise equipment, choose something that’s practical, enjoyable and easy to use. Consider checking out certain types of equipment at a fitness center before investing in your own equipment. To stretch your exercise dollars, consider buying used equipment — most often you’ll get very good quality for the money.

**Step 4: Get started**

Now you’re ready for action. As you begin your fitness program, keep these tips in mind:

• **Easy does it** Give yourself plenty of time to warm up and cool down with easy walking or gentle stretching. Then speed up to a pace you can continue for five to 10 minutes without getting overly tired. As your stamina improves, gradually increase the amount of time you exercise. Work your way up to 30 to 60 minutes of exercise most days of the week.

• **Work out in small doses** You don’t have to do all your exercise at one time. Shorter but more-frequent sessions have aerobic benefits, too. Fifteen minutes of exercise a couple of times a day may fit into your schedule better than a single 30-minute session.

• **Get your creative juices flowing** Maybe your workout routine includes various activities, such as walking, bicycling or rowing. But don’t stop there. Take a weekend hike with your family or spend an evening ballroom dancing.

• **Honor your body** If you feel pain, shortness of breath, dizziness or nausea, you may be pushing yourself too hard. Be sure to notify your physician if any concerning symptoms occur.

• **Be flexible** If you’re really overwhelmed or too sore, give yourself permission to take a day or two off. Just know that you’ll start back right where you left off.
Step 5: Monitor your progress

Repeat your personal fitness assessment six weeks after you start your program and then again every three to six months. You may notice that you need to increase the amount of time you exercise or increase the amount of weight you work with in order to continue improving. Or you may be pleasantly surprised to find that you’re exercising just the right amount to meet your fitness goals.

If you lose motivation, set new goals or try a new activity. Exercising with a friend or taking a class at a fitness center may be just what it takes.

Starting an exercise program is an important decision. But it doesn’t have to be an overwhelming one. By planning carefully and pacing yourself, you can establish a healthy habit that lasts a lifetime.
Your patients want to change... now you have the tools

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