
**NSSTA 2017 Fall Educational Meeting
October 18-20, 2017
San Antonio, Texas
Program Agenda**

Wednesday, October 18th, 2017

1:00 p.m. – 5:00 p.m. **Annuity Training** (Madero Ballroom)
1:00 p.m. – 5:00 p.m. **Committee Meetings**
5:30 p.m. - 7:30 p.m. **Texas “Boots and Spurs” Welcome Reception-**
 Navarro Ballroom Pre-Function Area

Thursday, October 19th, 2017

Navarro Ballroom

7:00 a.m. - 5:00 p.m. **Registration & Information Desk Open- Navarro Ballroom Pre-Function**

7:00 a.m. – 9:00 a.m. **Breakfast Buffet - Navarro Ballroom Pre-Function**

8:00 a.m. - 8:30 a.m. **Breakfast with the NSSTA Board of Directors**
NSSTA President Jim Early & Members of the NSSTA Board of Directors Will Welcome
NSSTA Members and Take Questions

8:30 a.m. – 9:15 a.m. **Industry Presentation**
Hear from Josephine Grillo Sullivan as she discusses the landmark Grillo v Pettiette case
that influenced the structured settlement industry and set a precedent for attorneys
working with special needs clients receiving settlements. Their case is about more than
settlements planning - it's about how Josephine's need to provide the best care for her
daughter, Christina, set her on a path that would change their lives and our
entire industry.
Speaker: Josephine Grillo Sullivan, The Grillo Sullivan Structured Settlement Consulting
Group

9:15 a.m. – 10:15 a.m. **Personal and Professional Branding Workshop**
Doing business in today's competitive landscape requires each of us to stand out from
the crowd. That's what personal branding is all about. NSSTA is pleased to announce that
LuAnn Reeb, President of Boston Media Group, will lead this exciting and informative
personal branding session.
Moderator: Lu Ann Reeb, Boston Media Group
Speakers: Brian Annandono, SFA
 Susan Clark, Millennium Settlements
 Cindy Chanley, Ringler

10:15 a.m. – 10:30 a.m. **Break**

10:30 a.m. – 11:30 a.m. **The Future of the Structured Settlements Industry**
This panel will share suggestions and evaluate initiatives designed to effectively drive the
structured settlements industry to new market heights. Panelists will identify challenges,
present objectives and lead a discussion on a future filled with impressive opportunities
and dramatic expansion.
Moderator: Geoff Kissel, Pacific Life
Speakers: Geoff Hunt, Ringler
 Chris Diamantis, IFS
 Scott Freeman, The Settlement Alliance
 Michael Goodman, NFP Settlements
 Brian Farrell, Ringler

11:30 a.m. - 12:00 p.m.

Liability MSA Update:

LMSA's are a challenge, and an opportunity. When new CMS rules go into effect, attorneys that may have never done an MSA as part of their practice will start doing them for the first time. This is a change in procedure, and NSSTA members have the ability to provide educational outreach and service to attorney clients dealing with MSAs for the first time.

Speakers: David Korch, Arcadia Settlements
Heather Sanderson, Chief Legal Officer, Franco Signor

12:00 p.m. - 1:15 p.m.

Lunch

1:15 p.m. - 1:45 p.m.

Estate Planning Principles for Settlement Planners

Top 5 Mistakes for Special Needs Trusts and Estate Plans

A count-down of the top five mistakes estate planners make when handling Special Needs Trusts and tips to avoid them.

Speaker: Bryn Poland, Associate Attorney, Pi Yi Mayo Attorney at Law

1:45p.m. - 2:15 p.m.

Workers Comp MSA: NEW CMS Reference Guide

The Centers for Medicare and Medicaid Services "CMS" recently stated that professional administration of Medicare Set-Aside Funds is "highly recommended." This CMS language is strong advice for anyone who is the beneficiary of settlement funds to pay for future Medicare-allowable expenses related to their injury or illness.

Speakers: Craig Pawley Medivest
Porter Leslie, Ametros

2:15 p.m. - 3:00 p.m.

Understanding "The Other Side"

Everyone knows that negotiating a successful structured settlement for your client requires a qualified and experience structured settlement consultant on the other side of the case. However, many structured settlement consultants or their respective clients may not fully understand or appreciate what a consultant on the other side of the case contributes to a successful settlement conclusion. This panel will explore and highlight unique skills and expertise required to reach a successful conclusion along with a discussion regarding "best practices" in dealing with emerging alternate settlement products, reaching agreement on CSA's and other key issues between consultants.

Moderator: Chris Shumate, Integrated Financial Services

Speakers: Bob Caples, Ringler
Carola Davis, Settlement Planners
Kim Overby, The Settlement Alliance
Kathryn Criswell, Alliant-Mesirow Insurance Services

3:00 p.m. - 3:15 p.m.

Break

3:15 p.m. - 4:15 p.m.

Dangers of Recycled Annuities

Too good to be true? The recycled annuity concept is touted as an alternative settlement funding method and it is made to resemble a typical structured settlement - but it is fraught with pitfalls and potential liability. By way of these "settlements," consumers resolve their personal injury cases by purchasing, on the open market, payments under prior structured settlements that were entered into by others. Although the promoters of these transactions advertise somewhat attractive yields, these transactions are not always what they at first appear to be and create problems - including tax liabilities - that likely outweigh the advertised rewards. This presentation will explain the architecture of these recycled payment streams and will articulate the risks that are associated with these devices - risks that are not always apparent to injured victims, their counsel, and the judges who approve settlements.

Speakers: Michael Miller, Drinker, Biddle and Reath, LLP
Peter Vodola, Reardon Scanlon LLP

4:15 p.m. – 5:15 p.m. **Washington, D.C. Political & Legislative Update:**
This session will bring Capitol Hill legislative activities and political developments directly to our members so they can fully appreciate the full range of tax reform proposals, medical malpractice reform initiatives and health care legislation developments that could impact our industry for years to come.
Speaker: Eric Vaughn, NSSTA

5:30 p.m. – 7:30 p.m. **Welcome to San Antonio Reception**
Hidalgo Ballroom

Friday, October 20th, 2017
Navarro Ballroom

8:00 a.m. - 10:00 a.m. **Registration & Information Desk Open**

8:15 a.m. – 9:00 a.m. **Ethics and Structured Settlements:**
In the structured settlement industry today, ethical behavior is more important than ever. Ethical standards set the tone of the culture that we work in, and determine how well all parties work together to help injury victims and their families. NSSTA is pleased to announce that Jim Early, President of The National Structured Settlements Trade Association, will lead this ethics and structured settlement session.
Speaker: Jim Early, Ringler

9:00 a.m. – 9:45 a.m. **A Dissertation on Dissipation**
Why do recipients of personal injury settlements run out of money before they anticipated? Most assume it is because they spend too much money. That is certainly true in many cases, but even those that manage to control their spending have the deck stacked against them. We will discuss why high fees; poor investor behavior and other factors make it unlikely that settlement proceeds last as long as they are intended to.
Speaker: Greg Micoletti, AIG

9:45 a.m. – 10:30 a.m. **The CSSC Program—25 Years of Professional Excellence**
Speakers: Patrick Hindert, S2kM

10:30 a.m. – 10:45 a.m. **Break**

10:45 a.m. – 11:15 a.m. **NSSTA University**
We will expand the professional educational and practical training opportunities offered by NSSTA University to provide enhanced industry knowledge to improve performance capabilities of structured settlement industry professionals.
Speaker: Debbie Sink, NSSTA CE/CLE Compliance Director
Eric Vaughn, NSSTA Executive Director

11:15 a.m. – 12:00 p.m. **Structured Settlements & Social Media—Challenges and Opportunities**
The Co-Chairs of the NSSTA Marketing Committee will highlight the new and exciting features we have added to the NSSTA web site to help provide our members with improved access to more high value information. This Panel Session will also focus on how structured settlement industry professionals can successfully enhance communication skills and achieve important marketing objectives by taking full advantage of the opportunities available from a range of social media platforms from Facebook and Twitter to YouTube and LinkedIn.
Speakers: Kevin Silo, Kipnes Crowley
Ryan Christen Oliphant, Ringler

12:00 p.m. **Adjourn**