

“Structures 101 & 202”

February 20-22, 2018

The “Structured Settlement 101” course is designed to provide foundational knowledge of the product, process and tax rules as a precursor to attending the “Structured Settlements 202” program. Topics include the basic process and timeline, the advantages to the parties involved in a structured settlement and considerations when assessing the taxability of the settlement proceeds. This brief course is geared toward new members of the Structured Settlement industry.

Tuesday, February 20, 2018:

Structures 101

3:00 p.m. – 5:30 p.m.

Structured Settlements “Basic” Program

Speakers: Patricia Fairhurst, Liberty Mutual
Toni Warbington, Arcadia

6:00 p.m. – 7:30 p.m.

Welcome Reception

Wednesday, February 21, 2018:

8:00 a.m. – 8:30 a.m.

Welcome Remarks/“202” Goals & Objectives

Speakers: Jim Early, Ringler
Eric Vaughn, NSSTA

8:30 a.m. – 9:30 a.m.

Settlement Documents

Speaker: Toni Warbington, Arcadia

9:30 a.m. – 10:15 a.m.

Assignment Document Language

Speaker: Jeanne Ragusa, Berkshire Hathaway

10:15 a.m. – 10:30 a.m.

Break

10:30 a.m. – 11:15 a.m.

A Dissertation on Dissipation

Speaker: Greg Micoletti, AIG

11:15 a.m. – 12:00 p.m.

Workers Compensation Documentation

Speaker: Dave Korch, Arcadia

12:00 p.m. – 1:00 p.m.

Lunch

1:00 p.m. 1:45 p.m.

Ethics and Structured Settlements

Speaker: Jim Early, Ringler

1:45 p.m. – 2:30 p.m.	Long Term Obligation Risk Speakers: Geoff Kissel, Pacific Life Ravi Vaswani, Pacific Life
2:30 p.m. – 3:30 p.m.	Special Needs Trusts, ABLE Act Accounts and Federal Government Benefits Patrick Hindert, S2Km
3:30 p.m. – 3:45 p.m.	Break
3:45 p.m. – 4:30 p.m.	MSA Professional Administration Speakers: Porter Leslie, Ametros Financial Joe Anderson, Medivest
4:30 p.m. – 5:15 p.m.	Medical Underwriting Speaker: Ken Keifer, AIG
5:15 p.m. – 5:30 p.m.	Summary of Day One Sessions
6:00 p.m. – 7:30 p.m.	Reception
<u>Thursday, February 22, 2018:</u>	
8:30 a.m. – 9:30 a.m.	Payees & Best Practices for Structured Settlement Claims Resolution Speaker: Betty Gregware, Mutual of Omaha
9:30 a.m. – 10:15 a.m.	Assessing Damages for IRC Section 104(a)(2) Treatment Speaker: John McCulloch, Arcadia
10:15 a.m. – 10:30 a.m.	Break
10:30 a.m. – 11:15 a.m.	Dangers of Recycled Annuities Speakers: Michael Miller, Drinker, Biddle and Reath, LLP Peter Vodola, Reardon Scanlon LLP
11:30 a.m. – 12:15 p.m.	How to Continue to Serve Your Clients After Policy Issuance Speaker: Dan Goodmann, Alliant-Mesirow
12:15 p.m. – 12:30 p.m.	Wrap-up and Presentation of Certificates Speaker: Eric Vaughn, NSSTA