



National  
**Structured Settlements**  
Trade Association

NSSTA 2019 Fall Educational Conference  
October 15 - 17, 2019  
Intercontinental Hotel  
Chicago, Illinois

**2019 NSSTA Fall Educational Conference Program Agenda**

**Tuesday, October 15, 2019**

- 7:30 a.m. – 12:00 p.m. NSSTA Board of Directors Meeting  
Room: Cordova
- 12:00 p.m. – 1:15 p.m. BOD Lunch with NSSTA Committee Chairs and Co-Chairs
- 1:30 p.m. – 5:00 p.m. NSSTA Committee Meetings
- 1:30 p.m. – 2:30 p.m. Marketing Committee (Room: Illinois)
  - 1:30 p.m. – 2:30 p.m. Innovation Committee (Room: Ohio)
  - 2:30 p.m. – 3:30 p.m. Legs & Regs Committee (Room: Ohio)
  - 2:30 p.m. – 3:30 p.m. PAC Committee (Room: Illinois)
  - 1:30 p.m. – 2:30 p.m. CSSC Committee (Room: Michigan)
  - 2:30 p.m. – 3:30 p.m. Education Committee (Room: Michigan)
  - 3:30 p.m. – 5:00 p.m. Legal Committee (Room: St. Clair)
- 5:30 p.m. – 7:00 p.m. NSSTA Annual Meeting Welcome Reception  
Room: King Arthur Court

**Wednesday, Oct. 16, 2019** Renaissance Ballroom

- 7:30 a.m. – 9:00 a.m. 2019 NSSTA Fall Meeting Breakfast Buffet
- 8:30 a.m. – 8:45 a.m. NSSTA President Michelle Caine Welcomes NSSTA Members to the 2019 NSSTA Fall Meeting & Opening Remarks
- 8:45 a.m. – 9:45 a.m. **NAMSAP & NSSTA Working Together on Medicare Set Aside Solutions:**  
Moderator: Tom Stanley, Summit Settlements  
Speaker: Craig Pawley, Medivest  
Speaker: Amy Bilton President of NAMSAP  
This session will focus on the unique challenges facing industry professionals when dealing with CMS rules and regulations, and where the responsibilities rest for all stakeholders involved in the settlement process. We will provide discussion on potential new regulations—especially in the area of Liability MSAs.

9:45 a.m. – 10:45 a.m.

**Annuitant Story**

Moderator: Dan Goodmann, Alliant-Mesirow

Speaker: Ron Bayer

Speaker: Cliff Horwitz of Horwitz & Horwitz Law Firm

This session will highlight the legal, procedural and emotional challenges a structured settlement consultant must address to successfully represent a seriously injured client facing a lifetime of health care, medical and living expenses after a tragic accident. We will hear directly from Ron Bayer and Dan Goodmann as they discuss Ron's accident and the legal journey, they successfully navigated together to reach a structured settlement solution.

10:45 a.m. – 11:00 a.m.

**Break**

11:00 a.m. – 12:00 p.m.

**Achieving Settlement on Complex Cases - a view from both sides of the table.**

Speaker: Porter Leslie – President Ametros

Speaker: Joan Vincenz - Managing Director - Corporate Safety for United Airlines

Speaker: Courtney Whistler - President - Sharpline Allocations

Speaker: Mack Babcock - Attorney the Babcock Law Firm

Hear from Joan Vincenz, MD of Corporate Safety for Self-Insured employer United Airlines and plaintiff attorney Mack Babcock on how they work with the injured party to determine their medical needs, what their current benefits are, and how a settlement could potentially be of benefit. Specialists in Medicare Set Asides and Professional Administration respectively from Sharpline and Ametros will share how they work with both sides to help achieve a settlement.

12:00 p.m. – 1:15 p.m.

Lunch: Keynote Speaker

1:15 p.m. – 2:15p.m.

**Judges discussion on Court Approval of Structured Settlements:**

Moderator: Andy Prindable, Waterville Advisors

Speaker: Judge Chris Lawler

Speaker: Judge Karen O'Malley

Speaker: Judge Larry Axelrod

This Panel Session will discuss what needs to be considered when legal counsel is called upon to make recommendations regarding the settlement. The session will illustrate how judges who preside over issues related to minors/incompetent settlements, probate, etc. are often asked to make recommendations regarding the settlement.

2:15 p.m. – 3:00 p.m.

**What Care Management Can Do for Your Case Load:**

Moderator: Christi Fried, Continental Trust Services

Speaker: Ryan Garrison, JCR Settlements

Speaker: Jeff Klugerman, Ringler

We will examine the value and return on investment when utilizing a care and benefits nurse consultant during the settlement or trial process. In a ‘real-life’ case, this analysis includes primary family caregiver considerations, debt, quality of life factors, large purchase needs and current/future third party benefit value as well as PI attorney mediation arguments relative to value of collateral benefits, availability of benefits, and out of pocket costs specific for the unique plaintiff.

3:00 p.m. – 3:15 p.m.

Break

3:15 p.m. – 4:15 p.m.

**“Law and Order” Update on Legal Issues, Case Law Matters and Relevant Legislation that Directly Affects Your Business”**

Speaker : Gina Wardlow, Prudential

Speaker: Tim O’Driscoll, Drinker Biddle

Speaker: Stephen Harris, Cozen O’Connor

4:15 p.m. – 5:00 p.m.

**“Making the Pie Bigger”**

Speaker: Plaintiff Consultant Speaker: Dan McCarthy, Waterville Advisors

Speaker: Defense Consultant Speaker: Dan Goodmann, Alliant-Mesirow

A behind the scenes look at how a plaintiff representative and a defense representative work to educate their respective clients on the importance of offering a structure during the settlement process.

As we are all well aware, structures are an important option for certain clients. If plaintiff attorneys offered their clients this important option at a higher rate, then the number of structure deals would increase significantly. The times in which defendants offer a structure during the settlement process also impacts this situation. Therefore, what can we do as settlement consultants to increase the number of times structures are offered? An insightful and lively back-and-forth between two seasoned settlement consultants will be the platform for this important discussion.

5:15 p.m. – 7:00 p.m.

NSSTA President’s Reception

**Thursday, October 17, 2019**

8:30 a.m. – 9:00 a.m.

**“State of the Structured Settlements Industry”**

Speaker: Eric Vaughn, NSSTA Executive Director

9:00 a.m. – 10:00 a.m.

**Non-Qualified Assignments:**

Moderator: Audrey Kenney, Sage Settlements,

Speaker: Dennis Drexler, Arcadia

Speaker: Paul Marshall, MetLife

Speaker: John Arendt, Berkshire Hathaway

Speaker: Serena Fitchard, Structures

Speaker: Rosa Florentino-Quest Settlements

This panel will identify cases that do not qualify for assignment under I.R.C. 130 and will discuss non-qualified structured settlement solutions. This case-study-based presentation involving producers and solution providers will demonstrate how non-qualified cases can be incorporated into your structured settlement practice.

10:00 a.m. – 10:45 a.m.

**Congress, Politics and Structured Settlements**

Moderator: Louis Masry, Quest Settlements

Speaker: Colin Finn, Alliant-Mesirow

Speaker: Chris Shumate, Arcadia

Speaker: Chris Larned, Arcadia

This Panel Session will focus on the critical political outreach work we do every day on Capitol Hill. The session could focus on the following key issues and challenges:

- NSSTA-PAC the “political voice” of the structured settlements industry
- What does NSSTA-PAC do for me?
- Personal political experiences you have had on Capitol Hill with Members of Congress and Congressional staff
- Take the Hill—the most important day for structured settlements industry leaders to make a difference and make an investment in our future
- 2020 National Political Election Predictions—Congressional Elections and the Presidential Election

10:45 a.m. – 11:00 a.m.

Closing remarks: Michelle Caine

11:00 a.m.

**Adjourn**

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Golf Bus departs at 11:15 **SHARP**