



NSSTA 2019 Annual Meeting

April 2 – April 4, 2019
Charleston, South Carolina

2019 NSSTA Annual Meeting Program Agenda

Tuesday, April 2, 2019

- 8:00 a.m. – 1:30 p.m. NSSTA Board of Directors Meeting
- 1:30 p.m. – 5:00 p.m. NSSTA Committee Meetings
- 1:30 p.m. – 2:30 p.m. Marketing Committee (Room: Pinckney)
 - 1:30 p.m. – 2:30 p.m. Innovation Committee (Room: Laurens)
 - 2:30 p.m. – 3:30 p.m. Legs & Regs Committee (Room: Pinckney)
 - 3:00 p.m. – 4:00 p.m. CSSC Committee (Room: Laurens)
 - 1:00 p.m. – 2:00 p.m. PAC Committee (Room: Calhoun)
 - 3:30 p.m. – 5:00 p.m. Legal Committee (Room: Middleton)
 - 4:00 p.m. – 5:00 p.m. Education Committee (Room: Laurens)
- 5:30 p.m. – 7:00 p.m. NSSTA Annual Meeting Welcome Reception

Wednesday, April 3, 2019

- 7:30 a.m. – 9:00 a.m. 2019 NSSTA Annual Meeting Open Breakfast
- NSSTA Annual Business Meeting
- 9:00 a.m. – 9:10 a.m. NSSTA President Geoff Kissel Welcomes NSSTA Members to the 2019 NSSTA Annual Meeting & Opening Remarks
- 9:10 a.m. Passing the Gavel: Geoff Kissel Introduces NSSTA President-elect, Michelle Caine for the Passing of the Gavel
- 9:10 a.m. – 9:20 a.m. Michelle Caine Presents NSSTA Agenda Objectives for 2020
- 9:20 a.m. – 9:30 a.m. NSSTA Awards: Geoff Kissel and Michelle Caine
- NSSTA Leadership Award
 - NSSTA President's Award
 - NSSTA BOD Service Awards
 - NSSTA Immediate Past President Award
 - Industry Champion Award

- 9:30 a.m. – 9:50 a.m. NSSTA Committee Reports: Michelle Caine
- CSSC—Karen Meyers & Chris Shumate
Education--Martha Hunt & Christi Fried
Innovation—Greg Micoletti
Legal—Tim O’Driscoll, Gina Wardlow & Pete Vodola
Legs & Regs—Kerri Poe & Christine Logan
Marketing—Kevin Silo & Ryan Christen Oliphant
- 9:50 a.m. – 10:20 a.m. NSSTA Board Candidate Speeches: Michelle Caine
- Len Blonder, Arcadia
Jim Early, Ringler
Ryan Jandreau, Arcadia
Tacker LeCarpentier, Summit
Randy Levine, Sage Settlements
Nolan Robinson, Ringler
- 10:20 a.m. – 10:30 a.m. Break
- 10:30 a.m. – 11:30 a.m. **Settlement Planning: A Holistic Approach**
Moderator: Sean Coleman
Speakers: Audrey Kenney, Randy Levine, Will Lindahl and Matt Ross
This session covers a wide range of information to consider in your settlement planning strategies. From bringing the sides together by offsetting costs with public benefits to expanding the power of trusts to understanding the monitoring and reporting requirements by SSA and much more. Learn how you can provide your clients with case settlement customization with enhanced options.
- 11:30 a.m. – 12:15 p.m. **Annuitant Story**
Speakers: Bryan Milner, Rosa Florentino and Luke Hampton
In one moment Luke Hampton was a star high school wrestler and the next moment he suffered a spinal cord injury in a wrestling match that left him paralyzed from the neck down. Despite countless physical challenges, Luke is an inspiration to everyone around him. Hear about his journey through medical, legal and psychological obstacles and the structured settlement consultants who helped him along the way.
- 12:15 p.m. – 1:30 p.m. Lunch
116th Congress—Challenges & Opportunities
Moderator: Peter Early
Speakers: Chris Shumate, Louis Masry, Colin Finn, Kerri Poe

1:30 p.m. – 2:30 p.m.

The Perils of Recycled Annuities

Moderator: Susan Clark

Speakers: Peter Vodola, Steve Harris & John Darer

Have you ever lost a case to cash and wondered why? Or had an attorney or claimant asked about matching unrealistic rates of return? Well, you may have unknowingly encountered a recycled annuity posing as a structured settlement. NSSTA members should be prepared to clearly distinguish between recycled annuities and structured settlements. This panel will address the current developments in the factoring market—both secondary and tertiary, how to identify a recycled annuity and how to dispel confusion about how a recycled annuity differs from a structured settlement.

2:30 p.m. – 3:15 p.m.

Implications of Settling Claimant's Bankruptcy for Negotiating and Administering Structured Settlements

Speaker: Craig Ulman

The bankruptcy of a settling claimant after he or she has been injured can profoundly affect any settlement and the disposition of settlement proceeds, because an injury claim that is unresolved at the time of the bankruptcy, and the proceeds of a claim that has been settled prior to the bankruptcy, automatically become property of the bankruptcy estate and cease to belong to the claimant. In some circumstances a claim arising from an injury occurring after the claimant's bankruptcy also can become bankruptcy estate property. NSSTA counsel Craig Ulman of Hogan Lovells US LLP will explain the applicable bankruptcy law provisions and their implications for claimants, attorneys, settlement consultants, insureds and insurers.

3:15 p.m. – 3:30 p.m.

Break

3:30 p.m. – 4:30 p.m.

Challenges and Opportunities with Liability MSA

Moderator: Michael Goodman

Speakers: Jim Early, John Cattie

This panel will discuss the challenges and opportunities that are presented by liability Medicare Set-Asides. There has been a lot of speculation that CMS will be providing more clarification about how to protect Medicare's future interest on a liability case. What are the challenges for each of our stakeholders: the defense, the plaintiff, and the plaintiff attorney? This panel will look at LMSA's from every angle both now and in the future.

5:00 p.m. – 7:00 p.m.

NSSTA President's Reception

Thursday, April 4, 2019

- 8:00 a.m. – 9:00 a.m. **Structured Settlement Industry Ethics**
Speaker: Jim Early
In the structured settlement industry today, ethical behavior is more important than ever and gives us our strength in a challenging environment. Ethical standards set the tone of the culture that we work in and determine how well all parties; and particularly brokers, work together to help injury victims and their families. Join this session and practical exercises presented by Jim Early, Immediate Past President of the National Structured Settlements Trade Association.
- 9:00 a.m. – 9:30 a.m. **Keynote Speaker: Ted Kennedy, Jr.**
You recognize him from the legacy of his last name - a name he once said, *'isn't always easy to live with.'* Ted Kennedy, Jr. is a partner at the firm of Epstein Becker Green in the Healthcare and Life Sciences Practice and an active leader in the movement to expand opportunities for persons with disabilities. He was elected AAPD Chair in 2017 and has served on the corporate boards of the country's most innovative health care organizations. From 2015 to 2019, Mr. Kennedy served as a State Senator in Connecticut, authoring more than 70 new laws expanding disability rights, home and community-based care, mental health parity implementation, and access to treatment for individuals with substance use disorders. He is the son of the late U.S. Senator, Ted Kennedy, Sr. and Joan Kennedy. And as a pediatric bone cancer survivor and amputee, Kennedy's story and life's work, dedicated to social reform and equal rights for disabled people is inspiring.
- 9:30 a.m. – 10:30 a.m. **The Benefit of Benefits**
Speakers: Ryan Garrison, Ann Koerner and Roger Bernstein
Analysis of the Value of Benefits specific to a Litigation Life Care Plan, Understanding the client's "real" vision for quality of life – beyond the litigation life care plan, Using a Medicare Set Aside analysis to support damages.
- 10:30 a.m. – 11:30 a.m. **Structured Settlements—A Judicial View**
Moderator: Tacker LeCarpentier
Speakers: Senior Resident Superior Court Judges Allen Baddour, Senior Court Judge Marvin Blount and Senior Resident Superior Court Judge Wayland Sermons
- 11:30 a.m. – 11:40 a.m. **NSSTA Election Results/Closing Remarks/Adjourn:**
Speaker: Michelle Caine
- Adjourn