

NSSTA 2020 Annual Business Meeting & Fall Educational Meeting
October 21-23, 2020

2020 NSSTA Annual Business Meeting:

Wednesday, October 21: (All times listed are Eastern Time)

11:00 a.m. – 11:30 a.m.

Opening Remarks

NSSTA President Louis Masry

11:30 a.m. – 11:40 a.m. NSSTA Awards Announcements

Louis Masry

Leadership Award

- President's Award
- NSSTA BOD Service Awards

11:40 a.m. – 12:10 p.m. NSSTA Committee Reports

Louis Masry and Eric Vaughn

- CSSC Committee: Chris Shumate
- Education: Martha Hunt
- Innovation: Michael Goodman
- Legal: Steve Harris
- Legs & Regs: Joe Loseman
- Marketing: Kevin Silo
- NSSTA-PAC: Colin Finn
- Women's Caucus: Rosa Florentino

12:10 p.m. – 1:00 p.m. NSSTA BOD Candidate Speeches:

Louis Masry and Eric Vaughn

- Mal Deener, Berkshire Hathaway
- Peter Early, Ringler
- Tacker LeCarpentier, Summit Settlements
- Randy Levine, Sage Settlements
- Greg Micoletti, American General
- Henry Strong, JMW
- Ravi Vaswani, Pacific Life

1:00 p.m. – 1:10 p.m. Break

2020 NSSTA Fall Meeting Program Agenda:
Wednesday, October 21, 2020

1:10 p.m. – 2:10 p.m.

One (1) CE Credit Hour

Panel Session #1: Liability Case Study and Fact Pattern

Session Description: Panel session participants will include structured settlement industry consultants reviewing the complexity of a serious personal physical injury case and debating and discussing the unique factors and fact patterns in the case.

- Moderator: Michael Goodman, NFP Settlements
- Scott Freeman, Sage Settlements
- Bruce DeBacher, Arcadia
- Andy Prindable, Waterville Advisors
- Rosa Florentino, Quest Settlements
- Jeff Klugerman, Ringler

2:20 p.m. – 3:10 p.m.

Two (2) CE Ethics Credit Hour(s) combined with part 2

Panel Session #2: Legal and Ethical Considerations for Utilizing a Structured Settlement Part 1

Session Description:

- Mike Miller, Cozen O'Connor
- Professor Larry Fox, Yale University
Lawrence Fox is a Senior Research Scholar in Law at Yale Law School and a partner of Schoeman Updike Kaufman & Gerber LLP in New York City where he practices in the areas of professional responsibility and corporate governance. He is a former chairman of the ABA Standing Committee on Ethics and Professional Responsibility and a former chairman of the ABA's Section of Litigation.

3:10 p.m. – 4:00 p.m.

Part 2

Panel Session #3: Structured Settlements Industry Ethics Session.

Session Description: This second hour of Ethics will consist of a panel discussion on the basic standards of professional conduct and legal issues surrounding ethical behavior on how do structured settlement industry professionals work together in such a competitive business? And how critical is ethical behavior to your work and your responsibilities to your clients?

- Eric Vaughn

4:00 P.M. Adjourn

2020 NSSTA Fall Meeting Program Agenda

Thursday, October 22, 2020

11:00 a.m. – 11:50 a.m.

One (1) CE Credit Hour

Panel Session #4: COVID-19: The New Realities

- Eric Vaughn
- Dr. Larry Gostin, Georgetown University
Lawrence O. Gostin is University Professor, Georgetown University's highest academic rank, and Founding O'Neill Chair in Global Health Law. He directs the World Health Organization Center on National and Global Health Law. Gostin is Professor of Medicine at Georgetown University and Professor of Public Health at Johns Hopkins University.

12:00 p.m. – 12:50 p.m.

One (1) CE Credit Hour

Panel Session #5: Allies, Alliances and Accomplishments

Session description: Four of the most impressive leaders in the Nation's Capital, who represent powerful and highly regarded organizations will provide structured settlement industry leaders with a comprehensive overview of their individual organizational goals and objectives when working with the U.S. Congress and the Trump Administration. These four leaders will also focus on the value and importance of establishing and maintaining alliances to address the challenges facing people with serious injuries,

including economic security, protecting government benefits, establishing consumer protections, and assuring legal protections.

- Moderator: Michelle Caine, Prudential
- Sally Greenberg, Executive Director, National Consumer League
- Susan Neely, President, American Council of Life Insurers
- Sarah Rooney, Policy Director, American Association for Justice
- Maria Town, President, American Association of People with Disabilities

1:00 p.m. – 1:30 p.m.

- **NSSTA Industry Discussion with Louis Masry & Eric Vaughn**

1:40 p.m. – 2:30 p.m.

One (1) CE Credit Hour

Panel Session #6: Taxing Post-Traumatic Stress Disorder

Session description: PTSD has been impacting soldiers since the Civil War up until the present day, with record numbers of Iraq and Afghanistan veterans presenting with PTSD and related disorders, but it is not limited to veterans. It can occur in reaction to other distressing events like sexual violence, physical assault, emotional abuse, terrorist attacks or traumatic accidents. With PTSD becoming more widespread and a recognizable harm in many types of settlements, knowing what it is and how it is taxed is an essential part of dealing with claims that involve PTSD.

The section 104 exclusion is a central feature of many structured settlements. You need physical injuries or physical sickness to qualify for the exclusion and for the corollary benefits of a tax-free structure. But is post-traumatic stress disorder (PTSD) physical? This panel will discuss the state of the tax law, as well as practical suggestions for settling cases and placing structures.

- Moderator: John McCulloch, Arcadia
- Nina Olson, Center for Taxpayer Rights

- Susan Bowersox, Sage Settlements

2:40 p.m. – 3:40 p.m.

Panel Session #7

ABLE Accounts, Trusts, and Investment Portfolio Issues

One (1) CE Credit Hour

- Moderator: Audrey Kenney, Sage Settlements
- Christi Fried, Continental Trust
- Cameron Lindahl, CPT Institute

3:40 p.m. Adjourn

2020 NSSTA Fall Meeting Program Agenda

Friday, October 23

11:00 a.m. – 11:10 a.m.

Announce NSSTA BOD Election Results

- Louis Masry, NSSTA President

11:10 a.m. – 12:00 p.m.

One (1) CE Credit Hour

Panel Session #8: “Law & Order” the NSSTA Legal Committee

Session description: Update on Legal Issues, Case Law Matters and Relevant Legislation that Directly Affects Your Business.

- Stephen Harris-Cozen O’Connor
- Sandra Jones-Faegre Drinker Biddle
- Brennan Neville-Berkshire Hathaway
- John Darer-Summit Settlements

12:10 p.m. – 1:00 p.m.

One (1) CE Credit Hour

Panel Session #9: How To Effectively Promote the Structured Settlement Annuity in Today’s Complex Financial Landscape

Session description: In this session, the panel will explore how SSA's compare to alternative investment solutions that are being promoted at an increasing

rate at mediation today. The panelists will make the case for the annuity comparing its features, investment returns, costs, to alternative strategies so that the settlement consultant is better prepared to effectively position SSA's for the settling parties.

- Moderator: Geoff Hunt, Ringler
- Geoff Kissel, Pacific Life
- Alexandra Hyten, Prudential
- John Arendt, Berkshire Hathaway
- Mari Hioki, MetLife

1:10 p.m. – 2:10 p.m.

Panel Session #10

Workers Compensation and Professional Administration

One (1) CE Credit Hour

- Johnny Meyer, Ametros
- Craig Pawley, Medivest
- Angel Viera, Arcadia

2:10 p.m. – 3:00 p.m.

Panel Session #11

2020 NSSTA Fall Meeting “Wrap-Up” Session

- Louis Masry, Quest Settlements
- Michael Goodman, NFP Settlements
- Susan Bowersox, Sage Settlements
- Len Blonder, Arcadia
- Nolan Robinson, Ringler
- Ryan Jandreau, Arcadia
- Michelle Caine, Prudential

Adjourn: 3:00 p.m.