

2024 NSSTA Virtual Fall Educational Meeting Agenda  
Thursday, October 24, 2024

**8:00 AM PST: Welcome & Opening Remarks:**

Speakers:

Kerri Poe - Arcadia  
Eric Vaughn - NSSTA  
Susan Bowersox - NFP

**8:10 AM PST – 9:00 AM PST Session #1: State of the Structured Settlement Industry Part 1:**

Moderators In Studio:

Kerri Poe – Arcadia  
Susan Bowersox – NFP  
Eric Vaughn - NSSTA

Speakers:

Bob Lee - IFS Companies  
Peter Jachym – Ringler

Session Description: "Challenges and Opportunities for Structured Settlements Reaching \$10 Billion—\$12 Billion." This Panel session will address these critical questions facing the structured settlements industry:

1. What are the three greatest challenges facing the industry today?
2. What are the key technology innovations driving business development?
3. How does the industry plan to address the need for more consultants?
4. Will succession planning drive growth in the industry?
5. How can our life company partners, and P&C companies help reach \$10-\$12 billion?

**9:05 AM PST – 9:55 AM PST Session #2: State of the Structured Settlement Industry Part 2:**

Moderators In Studio:

Kerri Poe – Arcadia  
Susan Bowersox – NFP  
Eric Vaughn - NSSTA

Speakers:

Brad Cantwell - Arcadia  
Michael Goodman – NFP

Dave Hickey- Brant Hickey  
Buster Joyner - Atlas  
Gerardo Monroy – Ringler

Session Description:

Five of the most respected, powerful and influential leaders in the structured settlements industry will debate the critical challenges facing the expanded use of structured settlements and discuss the unique demands confronting professional structured settlements consultants today. This session will explore the creative business strategies that have helped propel the most successful structured settlement companies in our industry’s history. These dynamic and successful industry leaders will explore how to embrace challenges as opportunities for growth.

**10:00 AM PST – 10:50 AM PST : Session # 3: Life Company Partners- Powering Growth and Expansion of Structure Settlements**

Moderators In Studio:

Kerri Poe – Arcadia  
Susan Bowersox – NFP  
Eric Vaughn - NSSTA

Speakers:

Angelina Albano – New York Life  
Jordan Bossler – American General Life Companies  
Michelle Caine – Prudential  
Geoff Kissel – Pacific Life  
Eric Mikulaninec - USAA

Session Description: Most structured settlement consultants do not fully understand how life insurance companies operate and make decisions regarding insurance policies. There are operational constraints, business considerations and regulatory requirements that go well beyond pricing. Life company leaders will offer their views and comments on the unique challenges they face working to help expand the structured settlements industry to \$10 billion—\$12 billion.

**10:55 AM PST – 11:45 AM PST: Session #4: AI for Case Management**

Moderator In Studio: Eric Vaughn

Speaker:

Leah Cooper - Global Chief Digital Officer at Sedgwick

Session Description:

In the session, Leah Cooper, Global Chief Digital Officer at Sedgwick, discusses the company's successful implementation of a generative artificial intelligence tool, Sidekick. The tool has been instrumental in processing and summarizing tens of thousands of claims documents, significantly improving efficiency and accuracy. The big picture: The integration of GenAI into the insurance claims management process is transforming the industry by automating tasks, increasing efficiency, and reducing resolution time.

**11:50 AM PST- 12:30 PM PST: Session #5: Medicare Basics and Beyond**

**Moderators In Studio:**

Kerri Poe – Arcadia

Susan Bowersox – NFP

Eric Vaughn - NSSTA

**Speakers:**

Alisa Hoffman - Brant Hickey

Shawn Dean - J29

Johnny Meyer – Ametros

**Session Description:** This Panel Session will address the basics of Medicare & Medicaid eligibility / coverage and cover important compliance areas when settling claims. This session will also provide important updates and areas to watch for in the near future. Three learning Objectives:

1. Understanding the basics of Medicare & Medicaid eligibility and coverage and be able to identify key compliance areas and concepts when resolving claims involving Medicare & Medicaid
2. Awareness of upcoming changes in the areas of Medicare & Medicaid as it relates to compliance, recovery and issues around post-settlement medicals
3. Knowing how to best position structured settlements as a vital tool in resolving claims involving Medicare & Medicaid

**12:30PM PST – 1:20 PM PST: Session #6: Strength of the Structured Settlements Industry**

**Moderators In Studio:**

Kerri Poe – Arcadia

Susan Bowersox – NFP

Eric Vaughn - NSSTA

**Speakers:**

Kathryn Criswell - Alliant

Peter Early – Ringler

Erin Jesberger – Arcadia

Paul Lesti - Summit

Session Description:

A large majority of claimants are unsure of all their options when it comes to receiving money from a settlement. They often rely on their attorney for guidance, which gives legal counsel a tremendous opportunity to recommend the settlement option that provides the highest level of long-term security, a structured settlement. The sad truth is that a large majority of claimants who receive lump sum settlements squander their funds within a few short years. Individuals who accumulate significant sudden wealth all too often have little to no money within a few years. Thankfully, structured settlements exist to ensure injured people will have consistent future income to match their future needs related to medical care and lost wages. Here are a few bullet points that illustrate why structured settlements are so valuable to attorneys:

1. Help set more realistic expectations.
2. Add additional value to the settlement by creating long-term financial security.
3. Allow for customization of future payments that match the client's specific needs.
4. When used properly, cases settle faster.
5. Overall, the strength of the structured settlements industry comes from its ability to provide financial stability, customization, and long-term security to individuals, supported by a stable investment base and a strong regulatory framework.

**1:25 PM PST – 2:30 PM PST: Session #7: Case Manager Best Practices**

Moderator In Studio:

Kerri Poe – Arcadia

Susan Bowersox – NFP

Eric Vaughn - NSSTA

Speakers:

Paulette Jacobsmeier - Arcadia

Nick Batko – NFP  
Sdot Carter – Forge  
Tracy Hall – Ringler  
Jackie Mercer - Arcadia  
Jennifer White – Sage

**Session Description:**

Cases have never been moving faster! Join us for a discussion about what Case Managers love about this work, how to leverage technology and process optimization to efficiently manage high caseloads, what folks are noticing in the industry, maintaining high levels of client satisfaction, especially when working remotely, potential pain points, how Consultants can help their Case Managers, and where we could be working better as co-roskers...together. We will also touch on transparency, which is crucial to the role of the case manager and balancing the ethical considerations that are essential to maintaining trust and integrity with our clients, and each other.

**2:30 PM PST Closing Remarks**

**Speaker:**

Kerri Poe - Arcadia

Day Two Friday, October 25, 2024

**8:00 AM PST: Opening Remarks:**

**Moderator in Studio**

Kerri Poe – Arcadia

**8:10 AM PST 9:00 AM PST : Session #8: Ethics, Cultural Awareness and Insurance Fraud Prevention, As Required by CADOL.**

**Moderators In Studio:**

Kerri Poe – Arcadia  
Susan Bowersox – NFP  
Eric Vaughn - NSSTA

**Speakers:**

Stacy McCall - Brant Hickey  
Ruben Soliz - USAA

Session Description:

Part 1 of this session will provide discussion on biases. Insurance professionals interact with clients from various cultural backgrounds, and understanding and acknowledging their own biases is crucial to providing fair and equitable service. By recognizing and addressing biases, agents can ensure they make ethical decisions that are not influenced by discriminatory beliefs.

Part 2 of this session will meet your CADOI Ethical 'Fraud' CE Compliance requirements for your resident or non-resident California Producer license with a pre-recorded video from California Insurance Commissioner Lara.

**9:05 AM PST – 9:55 AM PST: Session #9: CSSC 2024 – A Redesign Takes Form and Delivers Outstanding Results**

Moderator In Studio: Susan Bowersox – NFP

Speakers:

Jackie Mercer - Arcadia

Robin Young – Summit Settlements

Anna Koehler- Arcadia

Session Description: Join us for an engaging session as our expert panelists discuss the Certified Structured Settlement Consultant (CSSC) program. This session promises to provide valuable insights into the benefits, processes and opportunities associated with this certification.

**10:00 AM PST – 10:50 AM PST: Session #10: Capital Markets Update**

Moderators In Studio:

Kerri Poe – Arcadia

Susan Bowersox – NFP

Eric Vaughn - NSSTA

Speaker:

Dominic Nolan - Aristotle Asset Management

Session Description:

This session will discuss the current state of capital markets including the stock market and bond market. The Federal Funds Rate has been sitting at 5.5%, is a rate cut coming, will there be more? Discussion will include what the Fed might do the remainder of the year and what interest rates may do. A potential recession has been on the horizon, will it happen?

**10:55 AM PST – 11:40 AM PST: Session #11: 2025 Will Bring the Biggest Changes in U.S. Tax Policy in History**

**Speaker in Studio:**

Eric Vaughn - NSSTA

**Session Description:** 2025 Will Bring the Biggest Changes in U.S. Tax Policy in History: 2025 may well be the most consequential year in the history of US tax policy. While the U.S. Congress has a long history of enacting tax policies that sunset or expire on a specified date, thus putting the onus on subsequent Congresses to negotiate extensions of these tax policies, the country has never faced the number, size, and breadth of expiring or changing tax policies that it does in 2025. Over 80 different tax provisions included in the 2017 “Tax Cuts and Jobs Act will sunset in 2025. Over \$4 trillion in various tax policies will expire in 2025.

This session will highlight NSSTA and NSSTA-PAC efforts to meet with Members of Congress who serve on the House Ways and Means Committee and the Senate Finance Committee in preparation for the impending 2025 tax debate. Early and pro-active engagement with Congress is key to ensuring that policy makers are well-educated on structured settlement tax policy issues as once Congress convenes in 2025, it will be sprint to the end of the year. As the old saying in Washington D.C. goes, “If you’re not at the table, you’re on the menu.”

**11:40 AM PST: Closing Remarks**

**Speaker:**

Kerri Poe – Arcadia

Susan Bowersox – NFP

Eric Vaughn - NSSTA

**Adjourn:**