

NSSTA 2017 Annual Meeting
April 19 – April 21, 2017
San Francisco, CA

Wednesday, April 19, 2017

6:30 a.m. – 5:00 p.m.	Registration and Information Desk Open
6:30 a.m. -7:30a.m.	CSSC Committee Meeting – International Room
7:30 a.m. – 9:00 a.m.	NSSTA Growth Committee—Breakfast with the Board of Directors --Pavilion Room
9:00 a.m. -10:00 a.m.	Growth Committee Meeting – Pavilion Room
9:00 a.m. – 10:00 a.m.	Education Committee--Far East Room
9:00 a.m. – 11:00 a.m.	Legal Committee--Empire Room
9:00 a.m. - 10:00 a.m.	Marketing Committee--Hunt Room
9:00 a.m. – 10:00 a.m.	Membership Committee--California Room
10:00 a.m. -11:00 a.m.	PAC Committee--Hunt Room
10:00 a.m. – 11:00 a.m.	Legs & Regs Committee--California Room
10:00 a.m. – 11:00 a.m.	SNA Task Force Committee--Far East Room
11:00 a.m.	Bus departs Fairmont for Presidio Golf Course
12:00 noon – 5:00 p.m.	7 th Annual Bill Tocchi Golf Tournament at the Presidio Golf Club
5:30 PM	Bus will depart the Presidio Golf Course and transport players back to the Fairmont Hotel
12:30 p.m. – 4:30 p.m.	NSSTA Annuity Training Seminar-Fountain Room
6:00 p.m. – 7:30 p.m.	NSSTA Annual Meeting Welcome Reception- Pavilion Room and adjacent roof top garden patio.

Thursday, April 20, 2017

- 6:30 a.m. – 5:00 p.m. Registration and Information Desk Open
- 7:00 a.m. – 8:30 a.m. Continental Breakfast-Gold Room Foyer
- 8:00 a.m. – 8:10 a.m. Welcome & Opening Remarks
Len Blonder, NSSTA President
- 8:10 a.m.-8:30 a.m. NSSTA Passing the Gavel and NSSTA Awards
Len Blonder, NSSTA President
Jim Early, NSSTA President-elect
- 8:30 a.m. – 9:00 a.m. NSSTA Agenda Objectives for the Upcoming Year
Jim Early, NSSTA President
- 9:00 a.m. – 10:00 a.m. Access to Justice: The Mission of Helping Injured Parties
Moderator: Melissa Baldwin, Atlas Settlements
Speakers: Elise Sanquinetti, AAJ Vice President
Laurie Klimchock, CAOC Chief Operating Officer
- Session Description: This session will cover legislative challenges for structured settlement consultants in California and on a federal level. The panel will discuss upcoming cases that will have an impact on consultants, attorneys and claimants, as well as suggestions to ensure a positive working relationship between structured settlement consultants and attorneys.
- 10:15 a.m. – 10:30 a.m. Break
- 10:30 a.m. – 11:30 a.m. NSSTA Business Meeting
Jim Early, NSSTA President
Committee Reports
NSSTA BOD Candidate Speeches
--Melissa Baldwin
--Jordan Bossler
--Michelle Caine
--Ross Duncan
--Michael Goodman
--Spooner Phillips
--Tom Stanley

11:30 a.m. – 12:15 p.m.

My Story: Meg Hertzell-Busing

Moderator: Mike Wostoupal, AIG

Special Guest: Meg Hertzell-Busing, Camp YouCan

Session Description: Meg, a structured settlement recipient, had a traumatic brain injury as a result of a car accident in the late 90s, and then developed epilepsy. She spent her college summers volunteering at a California camp for kids with cancer and their siblings. Seeing what an amazing impact it had on kids affected by chronic illness, she made it her mission to bring that life-affirming experience to children with epilepsy throughout the Midwest. Meg founded Camp YouCan with her husband Kael in 2011 — the first and only camp of its kind in the Midwest.

12:15 p.m. – 1:30 p.m.

Lunch – Crown Room

1:00 p.m. – 1:30 p.m.

Keynote Speaker: “National Political Climate and Policy Developments”

Senator John Thune, R-South Dakota

1:30 p.m. – 2:30 p.m.

Getting Claims Professionals Invested in Structured Settlements

Moderator: Jim Early

Speakers:

Taylor Smith, President CLM Advisors

Dean Harring, Former Chief Claims Officer of QBE North America, GAB Robins, CNA, Zurich and Providence Mutual; Currently an Advisor for CLM Advisors.

Al Luther, Former VP of Litigation and Claims Quality for CNA and Chief Claims Officer for Firemans Fund Direct and Viking Insurance Company of Wisconsin; Currently an Advisor for CLM Advisors

Brad Cantwell, CSSC, President EPS Settlement Group

Jerry Lothrop, CLU, CSSC, Co-founder of Capital Planning Inc.

Session Description: This session will cover one of the Growth Committee’s biggest challenges – re-engaging *Casualty Claim Professionals* in *Structured Settlements*. The panel will discuss this issue from a claims professional’s perspective, as well as the changing environment of the property/casualty market. The panel will also discuss the challenge, and process, for structured settlement consultants looking to work with claims professionals in the most effective way.

2:30 p.m. – 3:15 p.m.

ABLE Act Implementation

Speaker: Stephen Dale, The Dale Law Firm, PC

Session Description: The ABLE Act is a new tool that can open opportunities for the persons with disabilities we serve, but to competently counsel clients about this tool it is important for the structure professional to have access to information on many aspects of the ABLE Act that they can direct their clients to that will assist them to make informed decisions. This presentation will focus on the basics of the ABLE Act and barriers that might be encountered in state laws and local rules.

3:15 p.m. – 3:30 p.m.

Break

3:30 p.m. – 4:30 p.m.

A Survey of Government Benefit Programs

Speaker: Amos Goodall, Steinbacher, Goodall & Yurchack

Session Description: The session will provide an overview of the four most important programs administered under the Department of Health and Human Services: benefitting persons who are older or who are disabled: Medicare, Medicaid, Social Security Disability and Supplemental Security Income.

4:30 p.m. – 5:15 p.m.

Special Needs Attorneys and Structured Settlement Consultants—
Working Together to Meet the Needs of Injured People.

Moderator: Pat Hindert, S2KM

Speakers: Morris Klein, Attorney at Law

Phillip Krause, Ringler

Eric Vaughn, NSSTA Executive Director

Session Description: Among NSSTA's strategies for growing the structured settlement market, the importance of special needs (SN) attorneys is receiving greater recognition and priority. NSSTA has recently formed a SN Attorney Task Force to better understand: the multiple roles SN attorneys play in personal injury settlement planning. This panel will discuss: 1) how structured settlement brokers can improve their business relationships with SN attorneys; and 2) current political priorities of the Special Needs Alliance and the National Academy of Elder Law Attorneys

(NAELA) and how NSSTA and those association might collaborate going forward.

5:30 p.m. – 7:00 p.m.

NSSTA President’s Reception: Crown Room

Friday, April 21, 2017

7:00 a.m. – 12:00 p.m.

Registration and Information Desk Open

7:30 a.m. – 9:00 a.m.

Buffet Breakfast -Foyer Gold Room

8:00 a.m. – 8:15 a.m.

Washington Legislative & Regulatory Update
Speaker: Eric Vaughn, NSSTA

Session Description: This Session will provide members with a comprehensive overview and analysis of the major federal tax reform proposals that are under discussion and debate in the House Ways and Means Committee and the Senate Finance Committee. Eric will also highlight the specific legislative challenges facing the structured settlements industry as Congress considers the most significant re-write of the Nation’s Tax Laws since 1986.

8:15 a.m. – 9:00 a.m.

Developments in MSA’s in Third Party Settlements
Speaker: Robert Sagrillo, Nuquest

Session Description

Considering Medicare's interests in workers' compensation settlements have become commonplace. Thus far, however, considering Medicare's interests in third party settlements is less common. This presentation will look at the legal requirements for considering Medicare's interests in third party settlements and the recent developments for doing so.

9:00 a.m. - 9:30 a.m.

A Claimant’s Story
Moderator: Eric Vaughn, NSSTA
Speaker: Judge Larry Quan, Retired
John Allen, Prestwick Group

Session Description

After years of working as a worker's compensation attorney, Judge Larry W. Quan (retired) was appointed as an Administrative Law Judge at the San Francisco Workers Compensation Board. Judge Quan held this position for over 10 years and adjudicated thousands of cases. In August 2011, Judge Quan sustained a central spinal cord injury, resulting in quadriplegia. With the help of his structured settlement consultant, John B. Allan of Prestwick Group, a plan was designed to meet Judge Quan's long term medical, housing and rehabilitation needs, with significant financial stability for his family.

9:30 a.m. – 10:00 a.m.

The 115th Congress and Federal Tax Reform

Speaker: Congressman Richard Neal, D-Massachusetts

10:00 a.m. – 10:15 a.m.

Break

10:15 a.m. – 11:15 a.m.

Challenges & Opportunities in Educating Defense Counsel

Moderator: Nolan Robinson, Ringler

Speakers: Kathy Martin, AIG

John Kouris, Executive Director DRI

Session Description

Kathy Martin, Assistant Vice President of AIG Structured Settlements and John Kouris, Executive Director of the Defense Research Institute ("DRI") will engage in a discussion about working with defense counsel on settlements involving structures. The discussion will include explorations of the challenges and opportunities associated with educating defense counsel and best practices for the settlement process. We will also learn about DRI's members and mission.

11:15 a.m. – 11:45 a.m.

Structured Settlement Industry Continuing Education Challenges and Opportunities

Speakers: Patricia Fairhurst, Liberty Mutual

Debbie Sink, NSSTA CE Program Director

Matt Ross, Liberty Mutual

Jordan Bossler, AIG

11:45 a.m. – 12:00 p.m.

Election Results and Closing Remarks

Jim Early, NSSTA President