

## **2022 NSSTA Virtual Fall Meeting Agenda**

### **Wednesday, November 2**

**All times are in Pacific Standard Time**

#### **8:00 AM PST: Session #1: NSSTA Board of Directors: All-Member Town Hall Meeting 'Live' from the Production Studio:**

**Speakers:** All Eleven NSSTA BOD Members

**Session Description:** First ever NSSTA Board of Directors All-Member Town Hall Meeting. The eleven members of the NSSTA Board of Directors will participate in the first ever All NSSTA Member Town Hall Meeting. During this unique session members of the NSSTA BOD will share their thoughts and comments on the major issues facing the structured settlements industry and industry wide goals for 2023.

#### **9:00 AM PST: Session #2: Keynote Speaker:**

**Speaker:** California Insurance Commissioner, Ricardo Lara.

**Session Description:** Ricardo Lara was elected in 2018 as the Commissioner of the California Department of Insurance. California is the nation's largest insurance market and fourth largest insurance market in the world. The California Department of Insurance is the consumer protection agency for the nation's largest insurance marketplace and safeguards all of the state's consumers by fairly regulating the insurance industry. Under Commissioner Lara's direction, the Department uses its authority to protect Californians from insurance rates that are excessive, inadequate, or unfairly discriminatory, oversee insurer solvency to pay claims, set standards for agents and broker licensing, perform market conduct reviews of insurance companies, resolve consumer complaints, and investigate and prosecute insurance fraud.

Commissioner Lara led the fight in California to address interpretation issues with the Gross Premiums tax to qualified structured settlements involving California residents. Commissioner Lara correctly identified structured settlements as a critically important tool to help ensure that injured plaintiffs can receive a lifetime stream of income once they have won a judgment, and lack of clarity regarding the tax-exempt status of qualified settlements is in

urgent need of attention. Commissioner Lara worked with California State Legislators on language to ensure qualified structured settlement annuities paid to injured consumers are kept whole. Structured settlement annuities are purchased to fund periodic payments to injury victims to help pay for their long-term medical care and living expenses, and other necessary care. In many cases these payments last the entire lifetime of the beneficiary.

Commissioner Lara's efforts have successfully clarified that qualified structured settlement annuities are not subject to state premium taxes.

### **9:40 AM PST: Session #3: Annuitant Story**

Moderator: Julie Robinson-Ringler

Speaker: Rachel

Session Description: Rarely do we get to see the results of the planning we do, but today we will hear from Rachel as she describes the experience of living out the plan, we put in place over ten years ago. She'll share what some of the best benefits were in having a settlement planner during that timeframe, but also some of the pitfall's money can create. How better to learn than to walk in an annuitant's shoes?

### **10:30 AM PST: Session #4: Why Structured Settlement Consultants Should Have a Seat at the Table**

Moderators: Tacker LeCarpentier and Michael Goodman

Speakers: Anne Marie Von Bank-Ringler

Kim Taylor-Settlement Funding Associates

Brian Farrell-Ringler

Robin Young-Summit Settlements

Chris Harlan -Summit Settlements

Session Description: How can the SS consultant be seen as a valued advisor and earn their seat at the table? Demonstrate how to partner with Plaintiff Attorneys on the value of bringing the SS consultants in early on a case. Right now, plaintiff attorneys see the product as too cumbersome, complex – slows down settling the case. How can the SS consultant simplify the process for plaintiff attorneys? Address these questions with how to solutions:  
--Are personal injury attorneys comfortable with structured settlements?

- Why does an attorney choose to recommend a structured settlement to a client?
- How can brokers help attorneys ensure their clients' settlements lasts?

### **11:30 AM PST: Session #5: State of the Claims Industry with Claims Professionals**

Moderator: Jeanette Hernandez

Speakers: Kathy Martin, AIG Structured Settlements

Larry Beemer, TMHCC

Heather Gutkes, American Family

Steve Hunckler, California State Work Comp Fund

Session Description: Claims Professionals will discuss trends, issues, and opportunities in the claim industry. Focusing on challenges today and over the next 12 months to give brokers a variety of viewpoints.

### **12:30 PM PST: Session #6: Structured Settlements are Cool Again**

Speakers: Dan Finn and Michael Burton

Session Description: Structured Settlements consistently provide benefits which exceed the payouts of other alternatives of similar risk. Rates are now more than 2 full percentage points better than they were 2 years ago resulting in a dramatic impact on quotes. Many clients now have the option to dedicate a portion of their funds into structured settlements linked to market performance.

### **1:20 PM PST: Session #7: National Political Outlook--Beltway Briefing**

Moderator: Eric Vaughn

Speakers:

Patrick Martin-Cozen

Towner French-Cozen

Kaitlyn Martin-Cozen

Session Description: Looking ahead at the critical midterm elections, perhaps no issue is likely to motivate Americans more at the polls than the state of their own finances. So just like it was in 1992, is it "the economy, stupid" again in 2022 and, if so, which economy? The one reflecting soaring gas, food and housing prices and historically high inflation, or the one indicating a tremendous labor market, sustained consumer spending, and continued

strong business investment? Meanwhile, in a recent poll, only 13 percent of voters said the country is on the right track, prompting some in the media to note that “everything is broken.”

**2:10 PM PST Session #8 Recap of the day and Preview for Thursday**

Tacker LeCarpentier – Summit

Eric Vaughn

Panelist:

Julie Robinson-Ringler

Jim Rothwell-Pacific Life

**2:30 PM: Adjourn Day One:**

**Thursday, November 3:**

**8:00 AM PST: Session #9 Marketing Today, Tomorrow and in the Future with social media**

Speakers: Jennifer Stinnett – eJenn Solutions Inc.

Session Description: NSSTA welcomes Jennifer Stinnett as our association’s new social media strategist. Jennifer Stinnett is owner/founder of eJenn solutions, a social media marketing company. Her business has been working in the social media space since 2009. This session is more than just social media it is also about how brokers connect with adjusters working remote and no longer in corporate offices. We are excited to hear Jennifer’s unique perspective for utilizing social media for branding and sales.

**8:50 AM PST: Session #10 : How the Inflation Reduction Act Does or Doesn’t Affect your Settlement**

Speaker: Teddy Snyder, JD

Session description: A discussion on things to consider in the new Inflation Reduction Act bill regarding the planning Structured Settlements Consultants do with injured parties. The out-of-pocket and who it applies to are key, as is the life-care valuations that could affect values and offers.

**9:40 AM PST: Session #11 Work Comp Case Studies**

Moderator: Kerri Poe

Speakers: Angel Viera-Arcadia

Dan Goodman-Alliant Mesirow

Session Description: Dialogue about how WC brokers work together to get cases settled. The roles the different brokers fill in getting to a settlement and how the different sides problem solve.

**10:30 AM PST: Session #12 DEIB- Value and Importance of Building a Strong Diversity, Equality, Inclusion and Belonging Program in America Today**

Moderator: Patti Nelson- Arcadia

Speaker: Glodean Champion

Session Description: Motivation, Inspiration, and laughter is what you can expect when Glodean Champion an experienced coach, educator, and facilitator walks onto the stage. She works with organizations to get to the root cause of culturally based challenges by transforming beliefs, behaviors, and assumptions. Glodean speaks professionally on issues relating to diversity and inclusion by approaching delicate subjects with honesty, authenticity, and vulnerability.

**11:20 AM PST: Session #13 Rapid Fire – Proven Business Hacks**

Moderator: Scott Brown-Summit

Speakers: Paulette Jacobsmeier-Arcadia

Session Description: It has been said that “Every person you meet in this world has something to teach you, and everyone you will ever meet knows something you don’t.” This is certainly true in the structured settlement world. It seems like every week we learn something new from a fellow structured settlement professional. Similarly, each one of has picked up helpful ideas or practices along the way that would also be beneficial to our colleagues if we took the time to share them.

**12:10 PM PST: 14 What is Going on in the Other Room?**

Moderator: Tony Robinson – Ringler

Speakers: Kathryn Criswell – Alliant Mesirow

Paula Rubinstein-NFP

Session Description: This session will provide discussion on how can we better support our respective clients, the injured party, and each other before, during, and after negotiations? Understanding perspective of why an offer may include a structure or how that offer with a structure is received is important. Why understanding what's going on in the other room will help support the positive message and intent of structures during negotiations with our respective clients and encourage better communication to facilitate a successful settlement.

### **1:00 PM PST: Session #15 Mediation Insights & Reflections**

Moderator: Connie Klingler – Alliant Mesirow

Speaker: Winter Wheeler, Mediator | Arbitrator | 2x TEDx Speaker | Attorney licensed in GA, FL, & NY | Bestselling Author | Creator at The Mediate Now™ Podcast J.D.

Session Description:

Winter is a former top civil litigator who has made her niche as an expert mediator. She is sought out for her unique, compassionate, and successful style of handling complex matters that involve a diverse range of cultures, including Spanish-speaking clients. Uniquely skilled at meeting people where they are, Winter understands that resolving a dispute often means peeling back the layers of accusations, mistrust, and ill-will to discover the real underlying issues. Most recently, Winter was a senior attorney at a prominent law firm, and it's this extensive body of experience she brings into her current mediation practice that makes her work stand out. A graduate of Georgetown University and Tulane Law School, Winter has always combined her passions for culture, diplomacy, and the law.

**1:50 PM PST: Adjourn**