



NSSTA 2026 Annual Conference

**“Make 2026 Your Best Year Ever!
It Starts at the 2026 NSSTA Annual Conference in
San Francisco.”**

Tuesday, April 21, 2026		
12:00 – 2:00 p.m.	<i>Women’s Caucus Summit</i>	Gold Ballroom
12:00 – 4:00 p.m.	<i>NSSTA “BIG” Committee Service Project</i>	Fairmont TBD
2:00 – 5:00 p.m.	<i>Committee Meetings</i>	Fairmont TBD
5:30 – 7:30 p.m.	<i>Welcome Reception</i>	Pavilion & Roof Garden
5:30 – 7:30 p.m.	<i>Friends of Bill reception</i>	Fairmont TBD
Wednesday, April 22, 2026		
7:00 – 9:00 a.m.	<i>Breakfast Buffet</i> <i>Beverage station all day</i>	Empire or Green Room
8:00 – 8:05 a.m.	<i>Welcome</i> Buster Joyner – Brian Farrell	Gold Ballroom
8:05 – 10:35 a.m.	Business Meeting including BOD Candidate Speeches	Gold Ballroom
10:35 – 10:45 a.m.	<i>Morning Break</i>	
10:45 – 10:50 a.m.	Athene 5-minute sponsored company presentation Greg Micoletti VP Structured Settlements	Gold Ballroom
10:50 – 11:20 a.m.	<u>Session 1: The Changing Landscape of Structured Settlements</u> <i>Presenters:</i> Buster Joyner – Brian Farrell <i>Session description:</i> Like never before, the structured settlement industry is facing an	Gold Ballroom



	<p>unprecedented range of challenges from: 1) The direct involvement of private equity; 2) Evolving consultant relations; 3) Introduction of advanced technologies; and 4) Introduction of new market-based products. These developments are dramatically “Changing the Landscape” of the modern structured settlement industry. As the industry continues to grow and evolve, two of the most respected and successful consultants will share their insights on the future direction of the industry. They will also debate and discuss how the industry landscape is changing and what the future of the industry will look like in two, five and ten years from now.</p>	
11:20 – 11:25 a.m.	<p>Prospera 5-minute company presentation Kevin Ogilby - President of Prospera Market Strategies.</p>	Gold Ballroom
11:25 – 12:00 p.m.	<p><u>Session 2: Risk, Return and Time: A Fresh Look at Financial Settlements and Financial Planning</u> <i>Presenter:</i> Peter Jachym <i>Session description:</i> The elements of risk, return and time are the building blocks of financial planning. How should we think of these three dimensions and how do they affect the uses of structured settlements?</p>	Gold Ballroom
12:00 – 1:30 p.m.	<p><i>Lunch - Structured Settlements Industry Champion Award</i> presented by NSSTA Member Melissa Baldwin to Nancy Drabble Chief Executive Officer of CAOC. (<u>Consumer Attorneys of California</u>)</p>	Crown Room
1:30 – 2:20 p.m.	<p><u>Session 3: The Future of Disability Policy</u> <i>Presenter:</i> Andy Imparato, Director, Disability Rights California <i>Session description:</i> Our country is at an inflexion point on many fronts, including how we think about civil rights, income supports, health care and services for people with disabilities and their families. Andy Imparato, an accomplished national disability leader and long-time friend of NSSTA, will discuss what he sees as the opportunities to improve policies and programs for people with disabilities in the years to come, leveraging some of the disruption and transformation that is happening at this moment. His talk will explore how the purpose and design of</p>	Gold Ballroom



	structured settlements could be used as a model for designing a more modern and effective system of long-term services and supports for disabled people who require these supports in order to live full lives in the community.	
2:20 – 3:10 p.m.	<p><u>Session 4: The Business Practices Behind Top Structured Settlement Consultants</u> Moderator: Brian Farrell Presenters: Andy Prindable Rosa Florentino Peter Early</p> <p>Session description: Success as a structured settlement consultant requires more than technical knowledge, it demands strong business practices, strategic relationship-building, and a commitment to client-centered service. This session explores the key habits and operational strategies that distinguish the most successful consultants in the industry. Attendees will learn practical approaches to developing referral relationships, managing cases efficiently, communicating value to attorneys and claim professionals, and building a sustainable, reputation-driven practice.</p>	Gold Ballroom
3:10 – 4:00 p.m.	<p><u>Session 5: Structured Settlement Advocacy: One Attorney, One Client, One Settlement Story</u> Presenter: Dan Finn Client: Sean M. Novak, Esq. Session description: Behind every structured settlement is a conversation. In this session, plaintiff attorney Sean Novak, a committed advocate for structured settlements on behalf of his clients, sits down with moderator Dan Finn to discuss why he's made structured settlements a cornerstone of his practice and how he introduces the concept to claimants. Then one of Sean's clients joins the stage to share their experience firsthand: the discussions they had, how they arrived at the decision to structure, and what they might do differently if given a second chance. If you want to understand what great client advocacy looks like, this is the session to be in.</p>	Gold Ballroom



4:00 – 4:50 p.m.	<p><u>Session 6: The Good, the Bot, and the Ugly about AI.</u> Presenter: Meredith K. Lowry, An intellectual property attorney Session description: As artificial intelligence rapidly transforms the business landscape, companies face critical decisions about how to harness AI's power while maintaining ethical standards and protecting client interests. "Some Assembly Required: Building Smart AI Practices" provides decision makers with the essential framework needed to navigate AI adoption responsibly, covering what AI actually is and what it can realistically accomplish, while addressing critical risks including algorithmic bias, confidentiality concerns, and AI-generated misinformation. This program equips participants with practical guidance on using AI ethically, safely, and in compliance with emerging legal standards, empowering them to make informed, responsible decisions in their everyday lives.</p>	Gold Ballroom
5:00 – 7:30 p.m.	Welcome Reception	Pavilion & Roof Garden
5:00 – 7:30 p.m.	Friends of Bill Reception	Fairmont TBD
Thursday, April 23rd		
7:30 – 9:00 a.m.	<p>Breakfast Buffet Beverage station all day</p>	Empire or Green Room
8:30 – 8:40 a.m.	<p><u>Session 7: Highlights from Day One of the 2026 Annual Meeting</u> Presenters: Brian Smith & Scott Brown</p>	Gold Ballroom
8:40 – 9:20 a.m.	<p><u>Session 8: From the Medicare Secondary Payer Statute to Medicare Set-Asides: A Plain-English Legal Overview for Workers' Compensation Settlements</u> Moderator: Michael Burton Panelist: Kerri Poe Kathryn Criswell</p>	Gold Ballroom



	<p>Steve Chapman Ryan Christian Oliphant</p> <p>Session description: This session will discuss</p> <ul style="list-style-type: none"> A. Purpose of the MSP Statute B. Expansion of Enforcement Authority C. The Workers' Compensation Settlement Gap D. CMS and the Creation of MSAs E. Legal Necessity in Practice 	
<p>9:20 – 10:10 a.m.</p>	<p><u>Session 10: Market Based Products: Company Perspective</u></p> <p>Presenters: Prudential – Christina Duran Pacific Life – Geoff Kissel Prospera – Kevin Ogilby Independent Life –Mikel Taft</p> <p>Session description: A company-focused overview of how leading providers in the structured settlement industry position their market-based products, highlighting the guidance each offers on when, why, and how their investment solutions can be used to meet claimant needs, manage risk, and complement traditional structured settlement options</p>	<p>Gold Ballroom</p>
<p>10:10 – 10:40 a.m.</p>	<p><u>Session 11: Market Based Products: Consultant Perspective</u></p> <p>Moderator: Colin Finn</p> <p>Panelist: Mike Schroeder Growth Structured Settlement (GSS) Ben Taylor – Prudential Income Advantage Rosa Florentino – Independent Life iStructure Tanis Kelly – Pacific Life Payout Plus</p> <p>Session description: Market-based structured settlement products are becoming an increasingly important part of the settlement planning landscape. This session will explore these products from the consultant's perspective, focusing on when and how they can be used effectively within a settlement plan. Attendees will gain insight into varying products,</p>	<p>Gold Ballroom</p>



	<p>potential benefits, and risks, and how these solutions can complement traditional annuity-based structured settlements. The discussion will also address best practices for explaining market-based options to attorneys and claim professionals, helping consultants provide balanced guidance while meeting the evolving needs of settlement recipients.</p>	
10:40 – 11:30 a.m.	<p><u>Session 12: Fifty Years on Capitol Hill</u> Lessons Learned & Observations to Share Presenter: Eric Vaughn Session description: Through personal stories, key lessons learned, and candid observations, Eric will share insights into policymaking, leadership, and the dynamics that shape legislative decision-making. Attendees will gain a deeper understanding of the inner workings of Capitol Hill and practical perspectives on navigating Washington’s complex political landscape.</p>	Gold Ballroom
11:30 a.m.	<p><i>Election results – Program Conclusion</i></p>	Gold Ballroom