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**2025 AASC Annual Meeting**

**Wednesday, September 17**

7:30-9:00pm Opening Reception

**Thursday, September 18**

8:15-9:00am Breakfast

9:00-9:15am Opening remarks & welcome

9:15-10:00am Rapid Fire Roundtable: Answers to Questions Every Settlement Consultant Wants to Know

*Louis Masry-Quest Settlements*

*Tanis Kelly-Sage Settlement Consulting*

10:00-10:20am Improving the Client Experience: Insights from the MetLife Personal Injury Settlement Study

10:20-10:30am Partner Spotlight: Prudential

10:30-10:40am Partner Spotlight: Pacific Life

10:40-11:00am *BREAK*

11:00-11:30am **Beyond the Numbers: Medicare Compliance, Trusts and Lien Collaboration Strategies for Structured Settlement Planners** (*Moderated by George Audi*)

*Stacy Scrip-Capital First Trust*

11:30am-noon **The Psychology of Disability: Family Impact and Second Hand Trauma**

*Jon Cain-Legacy Enhancement Trust*

*Eiszel Le & Caryn Sutherland-National Care Advisors*

Noon-12:45pm Lunch at hotel

12:55-1:05pm: Partner Spotlight: New York Life

1:05-1:15pm: Partner Spotlight: Independent Life

1:15-1:50pm AASC Report

1:50-2:00pm Partner Spotlight: Assura/Structures

2:00-2:50pm **The Great Settlement Swindle-An Interactive Ethics Mystery**\*

*Randy Levine-ESS Settlement Services*

2:50-3:35pm **Policy Pulse 2025-Structured Settlements, Compliance Shifts, and Impacts of Federal Tax Legislation**

*Dave Olander-Capitol Counsel*

*David Vaclavik-Sage Settlement Consulting*

3:30-3:45pm *BREAK*

3:45-4:35pm **Saving Tax with Overlooked Strategies**

*Jeremy Babener*

4:35-4:45pm *BREAK*

4:45-5:35pm**Life Insurance in Structured Settlements: Benefits, Options, and Best Practices**

*Scott Freeman-Sage Settlement Consulting*

*Kimberly Collins-Mirena and Company Insurance Agency*

6:00-8:00pm Dinner with Partner Members

8:00-11:00pm Presidential Party

*Sessions in bold are seeking CE credit. 5 credits pending, including an ethics credit.*

*\*Ethics credit*