AASC

AMERICAN ASSOCIATION OF SETTLEMENT CONSULTANTS

CONFERENCE

February 8-10

2022

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CONFERENCE SCHEDULE

Tuesday, February 8, 2022

11:00am-12:00pm **Board of Directors Meeting**
Location: Antilles C

12:00pm-1:00pm **Provider Committee Meeting**
Location: Antilles C

12:00pm-4:00pm **Free Headshots**
Location: TI Foyer

12:00pm-1:00pm **Alliance for Women Meeting**
Location: TI D

1:00pm-2:00pm **Continuing Education Committee Meeting**
Location: Bahamas

1:00pm-2:00pm **Legs & Regs Committee Meeting**
Location: Antilles C

1:00pm-4:00pm **Alliance for Women Open House**
Location: TI D

2:00pm-3:00pm **Marketing Committee Meeting**
Location: Bahamas

2:00pm-3:00pm **Membership Committee Meeting**
Location: Antilles C

3:00pm-4:00pm **Political Action Committee (PAC) Meeting**
Location: Antilles C

3:00pm-4:00pm **Structured Settlement Evolution Committee Meeting**
Location: Bahamas

4:30pm-6:00pm **AASCPAC Donor Reception**
Location: Antilles C
Current and prospective PAC donors are invited to enjoy drinks and hors d'oeuvres with remarks from Congressman Darin LaHood and Top D.C. Lobbyist John D. Raffaelli of Capitol Counsel.

6:00pm-8:00pm **Welcome Reception**
Location: Antilles AB

This conference is currently approved for 9 hours. Only AASC members in good standing will receive CE credits. Please check the requirements below for credit information. Agents: AL, AR, AZ, CA, CO, CT, DC, DE, FL, GA, IA, ID, IN, KY, LA, MA, MD, ME, MI, MO, MS, MT, NC, ND, NE, NH, NM, NV, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, WA, WI, WV, WY. All agent credit will be given in full conference attendance only.

Agents must attend the entire conference in FULL in order to be eligible for credit. Partial credit will not be given.

CONFERENCE SCHEDULE

Wednesday, February 9, 2022

7:00am-8:00am **Breakfast**
Location: TI Foyer

8:00am-8:30am **Welcome Remarks from AASC Board President Rebekah Reedy Miller**
Location: TI ABC

8:30am-10:00am **Trusts & ABLE Accounts Roundtable Discussion**
Location: TI ABC

Our speakers will provide a comprehensive overview of government benefits, ABLE accounts, and trusts. Learn about how to tell the difference between various government benefits and their impacts on the structure, the benefits of a corporate trustee, as well as when to use a pooled trust vs. a standalone account. Attendees will learn how to utilize these tools to benefit their clients.

Moderator:
- Jarrod Zea, Ringler

Speakers:
- James Creel, Capital First Trust Company
- Cameron Lindahl, Secured Futures

10:00am-10:15am **Exhibit Break**
Location: TI DEF

10:15am-11:15am Mediation: Adding Value Along the Settlement Path
Location: TI ABC
Don't just show up at a mediation - be prepared and play an active role in resolving cases. Settled claims equal happy clients! Our speakers will discuss steps you can take before, during and after mediation to add value to the process.

Moderator:
- Randy Levine, ESS Settlement Services

Speakers:
- Ryan Garrison, JCR Settlements
- Jodie Lamb, Arcadia Settlements Group

11:15am-12:00pm **Washington Update and Legislative Outlook for 2022**
Location: TI ABC
AASC's lobbyist and the Legs & Regs Committee co-chairs will discuss legislative priorities for the settlement planning industry, activity expected in the current legislative session, and impact the 2022 mid-term elections could have on the industry. The presenters will also the discuss ways AASC members can serve as effective advocates and help with the AASC Legislative Agenda.

Moderator:
- Jennifer Wieroniey, AASC

Speakers:
- JD Raffaelli, Capitol Counsel
- Chris Harlan, Summit Settlement Services
- Buster Joyner, Atlas Settlement Group
- Robin Young-Ellis, Robin Young & Company, Summit Settlement Services

12:00pm-1:30pm **Lunch with Keynote Speaker Dan Negroni**
W ork of the Future is Here: How to Attract, Create and Engage with Your Workers Clients
Location: Phil's Italian Steak House
PROBLEM: Keeping people engaged, interested and happy with you and your business is super hard after the pandemic. over 48% of your people want to quit their job and find new works because they feel disconnected. Clients don't know who to trust and are dying for a deeper and more meaningful connection. We are inherently disconnected and disengaged. We need to connect!

And we are only just at the beginning of this new future, which is changing everything about the way we live and the way we work. How are you preparing your secret weapon, your superpower, your Workers of the Future to foster success for your multi-generational organization through this fourth revolution?

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SOLUTION: By 2025, Millennials and Gen Zs will make up seventy-five percent of the workforce and start becoming your clients too. Millennials and Gen Zs will be both our worker of the future and our next-generation customer. As a successful CEO, entrepreneur, master coach and Work of the Future guru, Dan Negroni has trained, coached and mentored over 20,000 Millennials and Gen Zs and their leaders. Dan possesses a deep understanding of the attitudes, needs and expectations of the Worker and Customer of the Future. He knows how to meet their needs to help you create real results in your business today. Because the Worker of the Future has indeed arrived.

His provocative, inspiring, and empowering presentation delivers practical tips and tools that can be used immediately to help your organization access and retain a diverse, global talent pool to create a high-performing organization in a competitive, hybrid work and technology-driven economic landscaped win great clients.

- Come learn the tools to connect:
- Shift your mindset to Growth.
- Create Self-Mastery.
- Become driver of the Art of The Possible through understanding "WIFThem."
- Learn how to Communicate.
- Learn how to Build Trust.
- You the Author of your next chapter, learn how to start writing it.

1:30pm-2:30pm **Working with the Defense on Plaintiff Strategies**
Location: TI ABC

Learn effective approaches to work with defendants on strategies that will benefit plaintiffs. Our speakers will help you identify ways to reach agreement on settlements that benefit plaintiffs. Additionally, they will use case studies to demonstrate tax-saving strategies, working with defense to overcome standard objections about structures and the DOJ, and provide useful talking points about non-qualified structures.

Speakers:

- Brad Cantwell, Arcadia Settlements Group
- Louis Masry, Sage Settlement Consulting

2:30pm-2:45pm **Exhibit Break**
Location: TI DEF

2:45-3:45pm **Fee Deferrals and Non-Qualified Structures**
Location: TI ABC

Using case studies, this session introduces new products, provides a way to help claimants avoid double taxation, and gives you the tools to tap into the non-qualified market.

Speakers:

- Dennis Drexler, Assura Trust Company
- Serena Fitchard, Structures
- Jeremy Babener, Structured Consulting

3:45pm-4:00pm **Explanation of Election Procedures from President Rebekah Reedy Miller**
Location: TI DEF

4:00pm-5:00pm **Medicare Set-Aside (MSA) Best Practices**
Location: TI ABC

Settlement Consultants are financial stewards for both their clients and the federal government. MSAs serve a critical role in protecting Medicare's financial interest. Learn how to identify and resolve liens, as well as recent developments in MSA regulations and practical examples of use cases for MSAs.

Moderator:

- Brian Schachter, ESS Settlement Services

Speakers:

- Joe Anderson, Medivest
- Johnny Meyer, Ametros
- Jeri Alper, Saber Solutions
- Randy Levine, ESS Settlement Services

6:00pm-8:00pm **Conference Party**
Location: Antilles AB

10:00pm-12:00am **Inaugural President's Party**
Location: EBC at Night

Thursday, February 10, 2022

7:00am-8:00am **Breakfast**
Location: TI Foyer

8:00am-8:15am **Welcome Back from AASC President-Elect Jason Lazarus**
Location: TI ABC

8:15am-8:45am **Innovation in the Settlement Space: NextGen Structured Annuity and Mass Tort Solutions**
Location: TI ABC

In an industry that does not see a lot of change, our speakers focus on new products that settlement consultants can use to help clients further optimize their settlements. A prolonged low-interest rate environment and booming stock market have made the settlement market ripe for innovation. Learn how these new products could generate additional client interest and better protect the value of your client's funds.

Speakers:
- Michael Upchurch, Independent Life
- Chris Bua, Independent Life

8:45am-9:45am **Settlements/Coverage: Navigating Sexual Assault Cases**
Location: TI ABC

Learn how to distinguish when a settlement in a sexual assault case is taxable. Our speakers will review the physical injury requirement as well as review recent court decisions affecting taxability. Additionally, speakers will cover tax regulations for PTSD, wrongful life and sexual harassment cases.

Moderator:
- Louis Masry, Sage Settlement Consulting

Speakers:
- Robert Wood. Wood, LLP
- Audrey Kenney, Sage Settlement Consultants

9:45am-10:45am **Plaintiff Attorney Roundtable**
Location: TI ABC

This session will bring together leading plaintiff attorneys to discuss recent court decisions, noteworthy settlements and other insights from attorneys who regularly use settlements in their practice.

Moderators:
- Louis Masry, Sage Settlement Consulting
- Scott Freeman, Sage Settlement Consulting

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10:45am-11:45am **Using Qualified Settlement Funds (QSFs) as a Settlement Tool for the Plaintiff and Defense**
Location: TI ABC

This session will provide a comprehensive overview of QSFs, including their legislative history, how to set one up, ideal case types, marketing them to clients and benefits for both plaintiffs and defendants. Additionally, our speakers will discuss the use of a QSF in the PG&E wildfire case.

Speakers:

- Amanda Greenburg, ARCHER Systems
- Scott Freeman, Sage Settlement Consulting
- Robert W. Wood, Wood LLP

11:45am-12:00pm **Closing Remarks from AASC President-elect Jason Lazarus**
Location: TI ABC

This conference is currently approved for 9 hours. Only AASC members in good standing will receive CE credits. Please check the requirements below for credit information. Agents: AL, AR, AZ, CA, CO, CT, DC, DE, FL, GA, IA, ID, IN, KY, LA, MA, MD, ME, MI, MO, MS, MT, NC, ND, NE, NH, NM, NV, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, WA, WI, WV, WY. All agent credit will be given in full conference attendance only.

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JERI ALPER

Jeri Alper is a Certified Legal Nurse Consultant. Ms. Alper has undergraduate and graduate degrees from the University of Pennsylvania, and is a member of the American Association of Legal Nurse Consultants. She has both hospital-based clinical and administrative experience and has also worked for a major pharmaceutical manufacturer.

Jeri has utilized her medical knowledge and expertise to work with law firms initially to screen, investigate, and analyze medical records; identify appropriate medical experts, and help manage the ongoing interaction with the plaintiff's treating providers and experts. As a registered nurse and nurse practitioner, she has extensive experience in evaluating and understanding future medical needs and coordinating necessary government benefits. In this capacity, Jeri identified the need to help the disabled and catastrophically injured parties with their compliance of the MSP act and ensuring that plaintiffs have the resources and access to their post-settlement care and treatment.

JOE ANDERSON

Joe serves as Vice President of Business Development for Medivest. He is a frequent speaker on MSP compliance across the country. He has developed a special focus on integrating MSA's with Special Needs Trusts as well as Medicare compliance in the ever-changing liability arena. He will help you customize strategies to build into your future medical settlement planning.

JEREMY BABENER

Jeremy Babener is a nationally recognized tax attorney who focuses his practice on lawsuit awards, settlements, and complex structures. He serves as Special Tax Counsel at law firm Lane Powell and chairs the Legal Committee of the Society of Settlement Planners. He is the founder of Structured Consulting, which offers business advice to a wide range of companies, including those serving plaintiffs, general investors, and retail customers.

Jeremy previously served full time in Lane Powell's Tax Group and later as vice-president to firm client Multistream Capital, a financial company selling customized income stream investments. He previously served as a fellow in the U.S. Treasury Department's Office of Tax Policy, focusing on partnership tax issues including non-compensatory partnership options and debt-equity exchanges.

He received his Education LL.M., Taxation, and J.D. from New York University School of Law. He received his B.A. in Political Science with high honors from Haverford College in 2007.

SPEAKERS

CHRISTOPHER BUA

Chris Bua has spent over a decade in structured settlements on both the planning and provider sides of the industry. He oversees Independent Life's sales and marketing functions and is responsible for building relationships with settlement professionals across the nation. Chris is a board member of The Society of Settlement Planners and creator and co-host of the hit podcast, "Settlement Nation".

Prior to joining Independent Life, Chris held a variety of sales and operational roles at Delta Settlements, most recently as its Director of New Business. Chris earned a Juris Doctorate from Florida Coastal School of Law and a Bachelor of Business Administration from the University of Florida. In his spare time, Chris enjoys playing golf, listening to country music, and spending time with his daughter.

BRAD CANTWELL

Cantwell serves as the CEO of Arcadia Settlements Group. In over 25 years with the company, Brad has assisted in the settlement of more than 2,500 cases nationwide, personally attending thousands of mediations and settlement conferences. He speaks frequently on the subject of structured settlements, to lawyers, government agencies, insurance companies, and members of Congress.

Prior to joining the structured settlements industry, he worked for Hyatt Hotels Corporation in Chicago, taught Statistics at Arizona State University, and worked as a clinical investigator with the Arizona Heart Institute.

An active member of the American Association of Settlement Consultants, National Structured Settlements Trade Association, Brad has served as Chair of NSSTAPAC, and as Co-Chair of the Education and Long-Range Planning committees. He is currently a member of the Legislation and Regulations Committee. Brad assumed the role of President of Arcadia Settlements Group in 2014 and then CEO in 2019.

JAMES CREEL

James Creel joined Capital First in 2012 and has 30 years of experience in the financial services industry including banks, investments, insurance, and trusts. He has assisted personal injury victims establish financial plans since 1989 and has helped over 1,000 personal injury victims establish plans to protect and secure their financial future. James is a Chartered Special Needs Consultant.

As a Trust Consultant for Capital First, James works closely with settlement planners and trust attorneys to establish trust solutions to protect clients from wasteful dissipation of settlement funds and provide income, security, liquidity, and growth over theclients' lifetime. He frequently attends mediations and court proceedings.

James currently lives in the Charlotte, NC area with his wife and 4 children. He enjoys fly-fishing, hiking, and volunteering as a Middle School Baseball coach for his children's school.

DENNIS DREXLER

Dennis serves as Vice President, Business Development & Trust Officer at Assura Trust. He has over 20 years of financial services and insurance experience. He has served in executive positions for both plaintiff and defense firms. He has also developed specialty Offshore Assignment companies and Medicare Compliance companies across financial and legal industries.

SERENA FITCHARD

Serena Fitchard, Esq. is the President for Structures. She brings over fifteen years of structured settlement experience which she utilizes as part of the Special Markets team, the research, and development division for new products at Structures. Prior to joining Structures, Serena was an In-House Attorney for The Plaintiff's Resource, a lien resolution company, where she specialized in Medicare appeals. She also advised attorneys and injured claimants on subrogation and reimbursement matters regarding Medicare, Medicaid, U.S. Military, ERISA, and other health insurance plans. Serena began her career in structured settlements in 2001. As a Team Leader and Case Manager for The James Street Group, she gained extensive experience in designing and presenting structured settlement proposals and drafting and reviewing settlement documents. She also specialized in complex structured settlement planning involving government benefits protection, Medicare Set-Asides, trust planning, and non-qualified settlements. Serena earned her B.S. from the University of Texas at Austin and her J.D. from St. Mary's University School of Law. She is a member of the State Bar of Texas.

SCOTT FREEMAN

Scott Freeman, Co-Chairman of Sage Settlement Consulting (formerly The Settlement Alliance), is recognized as one of the nation's most accomplished settlement consultants. His years of experience and dedicated, results-based approach are invaluable to attorneys and the clients they represent. Scott works with hundreds of law firms across the country on both mass tort and catastrophic single-event injury cases for claimants involved in personal injury, workers' compensation, and wrongful death settlements.

With a robust financial background and nearly twenty years of experience in the settlement industry, Scott is adept at creating customized financial solutions with a focus on safety and financial security. As an ardent advocate for injured claimants, he has assisted in the placement of hundreds of millions of dollars into trust accounts for minors andincapacitated adults and is one of the largest structured settlement producers in the industry. Scott's skill at handling complex settlements led his previous firm, The Settlement Alliance, to being the court-appointed Trustee and Qualified Settlement Fund Administrator for hundreds of thousands of claimants involved in pharmaceutical and medical device litigation around the country. He has also served as the lead settlement consultant to the court-appointed guardians ad litem on thousands of mass tort cases involving minor children and incapacitated adults.

Scott holds insurance and securities licenses in all 50 states and is proud to be affiliated with one of the most elite financial services industry memberships in the country as a consecutive multi-year Top of the Table qualifier with the Million Dollar Round Table (MDRT) organization. Scott's leadership has resulted in multi-year recognition as a top structured settlement provider by Texas Lawyer. Scott and Sage Settlement Consulting are proud to be the largest sponsor of the Texas Trial Lawyers Association and Houston Trial Lawyers Association.

Scott currently resides in Houston, Texas with his wife and their four children. He is a member of St. Luke's Methodist Church and volunteers his time and resources in support of a number of philanthropic and service organizations.

RYAN GARRISON

Ryan J. Garrison is the Founder and President of Garrison Financial, LLC and Garrison Settlements. Together these companies offer trial lawyers, injury victims, and investment clients the most comprehensive and unique financial solutions in the country.

As a financial adviser, Ryan specializes in high net worth planning and wealth transfers from settlements and estates. For trial lawyers and investment clients, Ryan and his team provide qualified (401k & IRA) and non-qualified (defined contribution & cash balance) plans.

Ryan specializes in personal injury settlements and tax planning attorney contingency fees. On the settlement side, Ryan focuses on catastrophic injury, traumatic brain injury, and minors' settlements. From his first mediation, Ryan knew he wanted to serve as an injury victim advocate. He now has over 12 years of experience in working with trial lawyers, trustees, and injury victims. He holds his FINRA Series 7 and 66 securities licenses with united planners financial services and many state insurance licenses directly. Well respected in both the financial and structured settlement industries, Ryan is often asked to speak at related events.

Ryan is an active member of the community and sits on numerous boards including; the Society of Settlement Planners, and the Board of Directors of 123TaxCredit.com. Formerly Ryan has served as President of an HOA board, on the Board of Directors for the Arizona Latino Arts and Cultural Center, and has helped as a Wish Granter with Make-A-Wish Arizona.
He and his wife, Perla, live in Scottsdale, where they have three beautiful children and three dogs. He enjoys spending time with his family and swimming, camping, grilling, reading, and riding bikes with his children. Years ago Ryan enjoyed riding his Harley Road Glide, which is currently collecting dust in his garage.

AMANDA GREENBURG

Amanda Greenburg, Esq. is the Vice President for ARCHER Systems which is the leading settlement administration firm which offers a one-stop, comprehensive solution to claims administration including medical record review, special master services, lien resolution, bankruptcy, and probate coordination, qualified settlement fund administration, and distributions to claimants, law firms, and lienholders. Amanda graduated from Chapman Law School and immediately went into the plaintiff's practice. She used to practice plaintiff's law on both the mass tort and single event side before joining the American Association for Justice team.
Amanda joined the S3 - now ARCHER team - in 2006 and specializes in lien resolution, Medicare Set-Asides, and is currently overseeing the Qualified Settlement Administration Fund for 40,000 PG&E Wildfire Cases

CHRISTOPHER HARLAN

Christopher M. Harlan is President of Summit Settlement Services. Chris began his career with Summit in 2005 as a member of the company's Marketing Management Program and assumed increasing levels of recruiting responsibilities while developing new and innovative ideas for Summit's nationwide associates. He served as Vice President from 2007 to 2011 and was promoted to President in July of 2011. Since being promoted to President, Summit's production has more than doubled.

In addition to his role on the American Association of Settlement Consultant's Board of Directors, Chris is a current member of the National Structured Settlement Trade Association, as well as the Society of Settlement Planners. Prior to assuming his role with Summit, he led the production department of an NBC affiliate out of Minneapolis, MN. Harlan is a graduate of Iowa State University. He resides in Urbandale, IA with his wife and three children.

BUSTER JOYNER

Charles Joyner, Buster, is the founding principal and president of Atlas Settlement Group, Inc. His expertise and practice include providing annuity pricing and lifetime underwriting of injured persons for structured settlements in excess casualty, aviation, medical malpractice, general liability, and workers' compensation claims.

With over 30 years of experience dating from the enactment of IRC 104(a)(2) and 130(c) to exclude periodic payments from taxation in workers compensation and tort claims, Buster has worked with thousands of injury victims and their families who have relied on guaranteed payments to provide security and dignity for years to come. During his career, he has placed over 1 billion dollars of structured settlements with over 20,000 annuitants including the largest settlement annuity utilized to fund future environmental liabilities

Buster Joyner formed Atlas Settlement Group in 2005 in Atlanta. Since then, it has grown into an international organization with offices around the country and in London placing in excess of $600,000 million annually in structured settlement annuity premium. Buster received his Bachelor of Arts from the University of Georgia and is a member of the National Structured Settlement Trade Association (NSSTA).

AUDREY KENNEY

Audrey is a settlement consultant who brings expertise, understanding, and compassion to injury victims. She has worked with attorneys and their clients on many types of cases including Personal Injury, Medical Malpractice, Wrongful Death, Workers' Compensation, Sexual Abuse, Employment, Class Action, and Mass Tort. Audrey understands the important and complex financial decisions that face individuals and families who are receiving settlements. She advises attorneys and their clients about structured settlement options and helps law firms navigate the complexities of settlement-related issues (Medicare Set-Asides, Trusts, Lien Resolution). She also assists attorneys with designing fee structures for their contingency fees.(Medicare

Audrey graduated Magna Cum Laude from Texas A&M University and began her professional career as a teacher. She earned her Certified Structured Settlement Consultant designation from the Mendoza College of Business at Notre Dame University. Before joining Millennium Settlement Consulting (now Sage Settlement Consulting) Audrey worked for ten years as a settlement consultant with The James Street Group. She has been a speaker at numerous trial lawyer association seminars and enjoys talking with law firms, nsurance adjusters, and families about the advantages and protections afforded by structured settlements.In addition to working with her clients, Audrey enjoys spending time with her husband and two daughters. She credits her father, John Vaclavik, with introducing her to the structured settlement industry and being her mentor.

JODIE LAMB

Jodie Lamb applies nearly twenty years of experience from the claim, annuity, and structured settlement industry. Based in Phoenix, Arizona, she travels the nation to assist settlement negotiations and injured parties. She is an advocate of structured settlements and the benefits they provide to all parties involved. Jodie began her insurance career as a financial planner for Park Avenue Securities and Guardian Life Insurance Company in 1999, specializing in the sale of life and disability products, financial planning for retirement and estate needs. She then joined Nationwide Insurance handling personal injury claims and structured settlements. Jodie joined the Arcadia team in 2014.

Jodie holds a Bachelor's degree in Business Administration with a concentration in Finance from Ohio University. She completed her MBA at the University of Findlay and has obtained the distinguished Certified Structured Settlement Consultant and Master Structured Settlement Consultant designations from the University of Notre Dame in partnership with the National Structured Settlements Trade Association. Jodie is licensed in all fifty states and has been facilitating structured settlement solutions for more than ten years.

Married and the mother of twin girls, she understands the importance of preparing for the future. She is committed to bringing understanding, compassion, and commitment to each case by creating individualized payment plans customized for each client.

JASON LAZARUS

Jason D. Lazarus, J.D., LL.M., CSSC, MSCC is the founder and chief executive officer of Synergy Settlement Services. Synergy allows trial lawyers to focus on what they do best by handling all the issues which arise at settlement such as lien resolution, Medicare compliance, public benefit preservation, and settlement planning techniques for protecting the recovery. He is also a Principal and President of Multi-Claimant Solutions which offers lien resolution and MSP compliance services for mass torts.

Mr. Lazarus is a renowned legal settlement services industry expert. His written work is widely published and his thought leadership in Medicare compliance has been cited by Federal courts and Florida courts including the Florida Supreme Court. He is available to consult with trial lawyers across the country when they are dealing with the issues that arise at settlement including lien resolution, Medicare compliance, government benefit preservation, trusts, and protection of the financial recovery.

Mr. Lazarus is the proud father of three children: Sarah, Kyle, and Camille. In his free time, he is an avid cyclist and amateur auto racing given his passion for going fast! Mr. Lazarus has a passion for UCF and FSU football. He works out of the Synergy main office in Orlando.

RANDY LEVINE

Randy Levine is a settlement consultant and founding partner with ESS Settlement Services, an affiliate of Sage Settlement Consulting. He was a former trial attorney with Schachter & Levine, LLP, where he gained extensive experience that informs his settlement planning work with personal injury and medical malpractice clients. Prior to co-founding Schachter & Levine,

Randy was a senior litigator at a medical malpractice defense firm. Having worked for both plaintiffs and the defense, he brings a unique perspective to comprehensive settlement planning.

Randy graduated from Brooklyn Law School in 1994 with his Juris Doctorate. In 1993, he proudly won the Nassau Academy of Law's Moot Court Competition, as well as a Certificate of Distinguished Merit. Randy has been published by and has lectured with both the Practicing Law Institute and the New York State Academy of Trial Lawyers. He is a former member of the New York State Trial Lawyers Association, and a former Board Director of the New York State Academy of Trial Lawyers. In partnership with Sage Settlement Consulting, ESS Settlement Services is a Skyline Business Partner of the New York State Trial Lawyers Association.

CAMERON LINDAHL

Cameron serves as the VP of Advancement for Secured Alliance focused on expanding Trustee services for two nonprofits. Secured Futures in the form of Pooled Trust services operating nationally and the Good Shepherd Fund as Trustee for individually-drafted trusts.

In the past, Cameron spent several years directing trust administration, sales, and marketing for a national pooled trust provider. However, his passion for helping the community of disabled people started at a young age when his father became legally blind in his thirties. He started his career by serving one of the lowest-performing schools in Florida, teaching students with special needs and severe behavioral disorders. Cameron remains proud

that he was part of the team that successfully earned the status as a "turnaround school." Cameron's graduate degree in Policy and Evaluation with mixed-methodology research experience helps him translate complex government policies to the legal community and general public.

In his spare time, Cameron relishes time in nature. He and his wife can often be found camping, kayaking, and hiking with their two dogs.

LOUIS MASRY

Louis Masry is a settlement consultant at Sage Settlement Consulting (formerly Millennium Settlement Consulting). He has extensive industry expertise including almost three decades of Financial Planning experience and 19 years of Settlement Planning experience. He plays an instrumental role in developing a complete financial assessment of a plaintiff's immediate and long-term financial needs. He also provides plaintiff attorneys with fee structuring options, allowing them to take advantage of the unique opportunity to defer taxation on earned fees.

Prior to joining Millennium Settlement Consulting, Louis worked as the President and CEO for Sunrise Financial Services in Westlake Village, CA, was the Vice-President for Prudential Securities, Inc. in Los Angeles, CA, worked as a Financial Advisor at Dean Witter Reynolds, Inc. in Pasadena, CA and as a Senior Floor Reporter for the New York Stock Exchange. Louis is an affiliated member of the following organizations: Consumer Attorneys Association of Los Angeles (CAALA); Consumer Attorneys Association of California (CAOC); Consumer Attorneys Association of San Diego (CASD); Nevada Justice Association (NJA); Association of American Justice (AAJ); California Applicants Attorney Association (CAAA). Louis holds professional licenses and designations including Securities Licensed (FINRA), Series 7, and Series 63. He attended California State University, Northridge, and Los Angeles Valley College.

DAN NEGRONI

Workplace expert, serial entrepreneur, hyper-growth CEO, Amazon best-selling author, kick-ass Executive Coach, attorney, and Inc.'s Top 100 Leadership Speakers of 2018 on a mission to help companies maximize the potential of their workforce, create the "next gen" workplace of the future and build impactful leaders NOW!

JOHN D. RAFFAELLI

John D. Raffaelli is the founding partner of Capitol Counsel, LLC. He has more than 35 years of experience in federal policy and policymaking, with an emphasis on taxation, finance, health care, international trade, and general business matters. Raffaelli is nationally recognized as one of the most effective lobbyists in Washington and is respected by both Democratic and Republican lawmakers for his knowledge of the legislative process and his ability to develop public policy solutions to client problems. In 1994, he was named by Washingtonian magazine as one of the Top 50 Lobbyists in the Nation's Capital, and he has made every top lobbyist list in the magazine since it began publishing them. In 2012, he was listed in Washington Life Magazine as one of the 100 Most Influential People in Washington. Raffaelli is active each year in many House and Senate campaigns.

John holds an L.L.M in Tax from New York University Law School and a J.D. from the University of Arkansas Law School. Additionally, he holds a B.S. from American University.

Previously, John served as the Founder and Chairman of The Washington Group, There he represented a wide variety of business, tax, and trade clients on Capitol Hill and before executive branch agencies. The Washington Group's predecessor firm was McAuliffe, Kelly, and Raffaelli.

Additionally, he served as counsel for tax and international trade in the Office of Senator Lloyd Bentsen (D-TX) in Washington, D.C. He has an extensive expertise in the tax rules governing depreciation, R&D, insurance, real estate, energy, and other issues. He also worked as an attorney-adviser in the Office of Chief Judge Samuel Sterrett of the U.S. Tax Court, a staff assistant in the Office of Congressman Wright Patman (DTX), and a partner at the law firm Bishop, Cook, Purcell, and Reynolds Law Firm in Washington, D.C. His campaign work includes the 1992 Clinton for President campaign; 1996 Clinton-Gore national finance committee; and Vice-Chair of the Kerry for President campaign national finance committee. He served as a board member for the Susan G. Komen Foundation from 2011-to 2016 and was a past member of the President's Advisory Committee for the Arts for the John F. Kennedy Center for the Performing Arts in Washington, D.C. Additionally, he served as a former managing trustee for the Democratic National Committee.

From changing the definition of under construction to include archeological excavation, creating a new depreciation rule for sale-lease transactions, creating new kinds of tax-advantaged accounts, or working to fix the tax treatment of unique and new financial transactions, Raffaelli has been a key player in developing the strategy that advanced sound tax policy and business reality. His ability to find creative solutions to conflict has been the key to his success as a lobbyist, a skill that he has used in other fields such as trade, financial services, and health.

REBEKAH REEDY MILLER

Rebekah Reedy Miller is a structured settlement consultant that has assisted the Plaintiff's Bar since 2006. Presently she is the largest sponsor of the Texas Trial Lawyers Association and Dallas Trial Lawyers Association and sponsors many other local Trial Lawyers Associations in the state of Texas. Rebekah is considered to be one of the most successful brokers throughout the state of Texas and she was selected for the Texas Lawyer Best Structured Settlement Firm in Dallas and the Texas Best list from 2014-to 2020. She is a member of the National Association of Professional Women.

Rebekah has a considerable amount of experience working with trial lawyers in various roles over the years including the Texas Trial Lawyers' Association, Local Trial Lawyer Associations and in the placement of structured settlements in personal injury and medical malpractice cases. She is licensed in Life, Accident, and Health Insurance and specializes in annuities. For most of her professional career, she has worked exclusively with plaintiff attorneys and their clients assisting with Structured Settlements, Structured Attorney Fees, & Qualified Settlement Funds. Rebekah is innovative by taking the lead in settlement planning and assisting with the utilization of Special Needs Trust; Health, Maintenance & Education Trust; Medicare Set-Asides, and Affordable Health Care.

"I genuinely believe in the work that the plaintiff's bar performs on behalf of victims and their families," says Reedy Miller. Therefore, I am diligently committed to working exclusively for trial lawyers and their clients.

BRIAN SCHACHTER

Brian Schachter is the Co-Founder of ESS Settlement Services, an affiliate of Sage Settlement Consulting.

He is also a partner and a practicing plaintiff attorney at the law firm of Schachter & Levine in New York City. As a settlement consultant, Brian combines his legal background with his settlement consulting experience to assist injured plaintiffs and their attorneys in developing customized settlement solutions.

A graduate of Brooklyn Law School, Brian began his private law practice in 1995 and has received his Series 7 and Series 66 licenses. He has lectured for multiple organizations, including the New York State Academy of Trial Lawyers and the Brooklyn Bar Association, and has been published on the New York Law Journal website.

Brian is a former of the New York State Academy of Trial Lawyers, and the New York State Trial Lawyers Association. In partnership with Sage Settlement Consulting, ESS Settlement Services is a Skyline Business Partner for the New York State Trial Lawyers Association

MICHAEL UPCHURCH

As a financial professional, Michael Upchurch creates value for clients by looking at each customer as a unique individual with unique financial needs. Michael is dedicated to providing individuals, families, and business owners with the professional attention necessary to help them achieve their financial goals, offering continued service as their needs change.

Michael is a highly accomplished seasoned professional with over 15 years of professional experience. As Chief Executive Officer of Delta Settlements, he oversees an organization that places in excess of $250 million a year in annuities and managed assets. Michael's heart and soul have always been in helping individuals and families create, implement, and manage customized financial plans.

Over 95% of Michael's new business comes from referrals from the legal community. Michael often presents continuing legal education courses focusing on trust and tax-related issues to state and local associations. Specifically, he and his team are active in the following National and State associations: American Association of Trial Lawyers, Florida Justice Association, Jacksonville Justice Association, Orange County Justice Association, Tampa Bay Trial Lawyers Association, Palm Beach Trial Lawyers Association.

Michael is known for providing unique and creative solutions to clients' tax, estate, and business problems, utilizing a variety of financial protection and asset accumulation products and services. He also helps in finding the dollars to fund the purchase of the most appropriate products to fit their need(s), including life insurance, annuities, and investments. Working closely with customers and their trusted advisors to identify their financial needs, Michael uses these tools to help craft strategies for each client's situation.Michael received his undergraduate degree from Emory University in Atlanta, Georgia, and his Master's in Business Administration from Southern Methodist University in Dallas, Texas. Active in the community, Michael is currently the District Chairman for the Great Muskogee District of the Boy Scouts of America and is an active basketball and baseball coach at the YMCA and NOL invJacksonville, Florida. Michael enjoys boating, golfing, football, and family time with his wife Holly, daughter Isabella, and sons Mick and William.

JENNIFER WIERONIEY

As AASC's Executive Director, Jennifer Wieroniey serves as the Chief Executive Officer of the AASC and the AASC Political Action Committee (PAC). A resident of Washington, D.C., Jennifer is a veteran association executive, previously she served as Executive Director of the American Trucking Associations' National Accounting and Finance Council. Jennifer also has experience working on Capitol Hill and has successfully advocated before the Internal Revenue Service, the U. S. Small Business Administration, and Congress. A former tax attorney, she has an expertise in federal tax regulations and finance.

Jennifer earned her law degree from Drexel University's Thomas Kline School of Law in Philadelphia. Additionally, she holds an M.A. in Public Policy from Johns Hopkins University and a B.S. in Economics and Political Science from Towson University. She has been admitted to the bar in Maryland, the District of Columbia, and the U.S. Tax Court. She holds an active membership with the D.C. Bar Association. Jennifer lives in Washington, D.C. with her husband, two young children, and two dogs. She is an avid runner, having completed nine marathons. Before kids changed everything, Jennifer enjoyed traveling the world and has visited six of the seven continents. Additionally, she serves on the Board of Directors for the Palisades Community Association, where she frequently volunteers her time.

ROB WOOD

Rob Wood is often listed among the top ten tax lawyers in America. He handles a broad range of tax planning and tax controversies. He also serves as an expert witness on tax matters in civil cases, class actions, disputes over independent contractor or employee classification, etc. A widely published author known for explaining and demystifying complex tax concepts, Mr. Wood is best known for his expertise advising plaintiffs, defendants, lawyers, and settlement funds on settlements and judgments. He authored the leading book on this topic, Taxation of Damage Awards & Settlement Payments (5th Ed 2021), as well as the Bloomberg Tax Management Portfolio Tax Aspects of Settlements and Judgments (522).

The author of numerous other tax books and hundreds of articles, he is listed among the elite tax lawyers in the United States by many best lawyers periodicals. Mr. Wood writes regular columns in Tax Notes, Forbes, and other publications, and comments on tax matters in the media.

ROBIN YOUNG-ELLIS

Robin Young-Ellis is the President and CEO of Robin Young & Co, a member of Summit Settlement Services. Her firm is dedicated to the plaintiff and plaintiff's family, personal injury attorney, and their legal team, offering injury victims a unique brand of personal attention and financial assistance at a critical juncture on their road to recovery.

Young-Ellis is a mong the first one-hundred (100) industry professionals in the nation to earn the prestigious Certified Structured Settlement Consultant designation, and among the first twenty-three (23) industry professionals to earn the Master's Structured Settlement Consultant through the University of Notre Dame.

JARROD ZEA

Jarrod Zea has been with Ringler since 2007. His focuses are worker's compensation, physical injury, premises liability, attorney fees, and coordination of public benefits to injured claimants. Jarrod has a B.S. in History from California State University Long Beach. He holds the following licenses and certifications: Life, Accident and Health Agent (CA), California Licensed Professional Fiduciary, National Certified Guardian, RIMS, Parma, California Applicants Attorney Association, Claims Litigation Management.

Jarrod has lived in the Orange County area of Southern California for all of his life. He graduated from California State University Long Beach with a degree in History with an emphasis on the United States and Modern Europe. His outdoor interests include scuba diving, skydiving, and his Alaskan Husky.

OUR COMPANY'S MISSION, VISION, AND VALUES ARE ALIGNED WITH THOSE OF THE AASC.

We partner with settlement consultants to provide a better outcome to injury victims and their families. With the best customer service team in the structured settlement market, you and your team will spend more time focused on what matters most and less time waiting on answers and policies.

A FRESH TAKE ON STRUCTURED SETTLEMENTS

To us, "Safe. Secure. Settled." isn't just a marketing slogan; it is the foundation upon which our company is built, leading us to become the second fastest growing life insurance company in the industry.

INDEPENDENT LIFE IS:

SAFE.

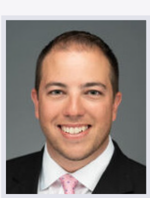
Safer through a mono-line product approach, no high interest rate liabilities to manage, and global investment leader BlackRock managing our bond portfolio

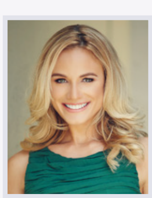
SECURE.

More secure for plaintiffs through unique protection enhancements outlined in our Payee Protection Policy

SETTLED.

Creating more settlements (and structures) by bridging the gap other providers are unable or unwilling to do, whether it be through realistic rated ages or the acceptance of qualified settlement funds in compliance with IRC 468B





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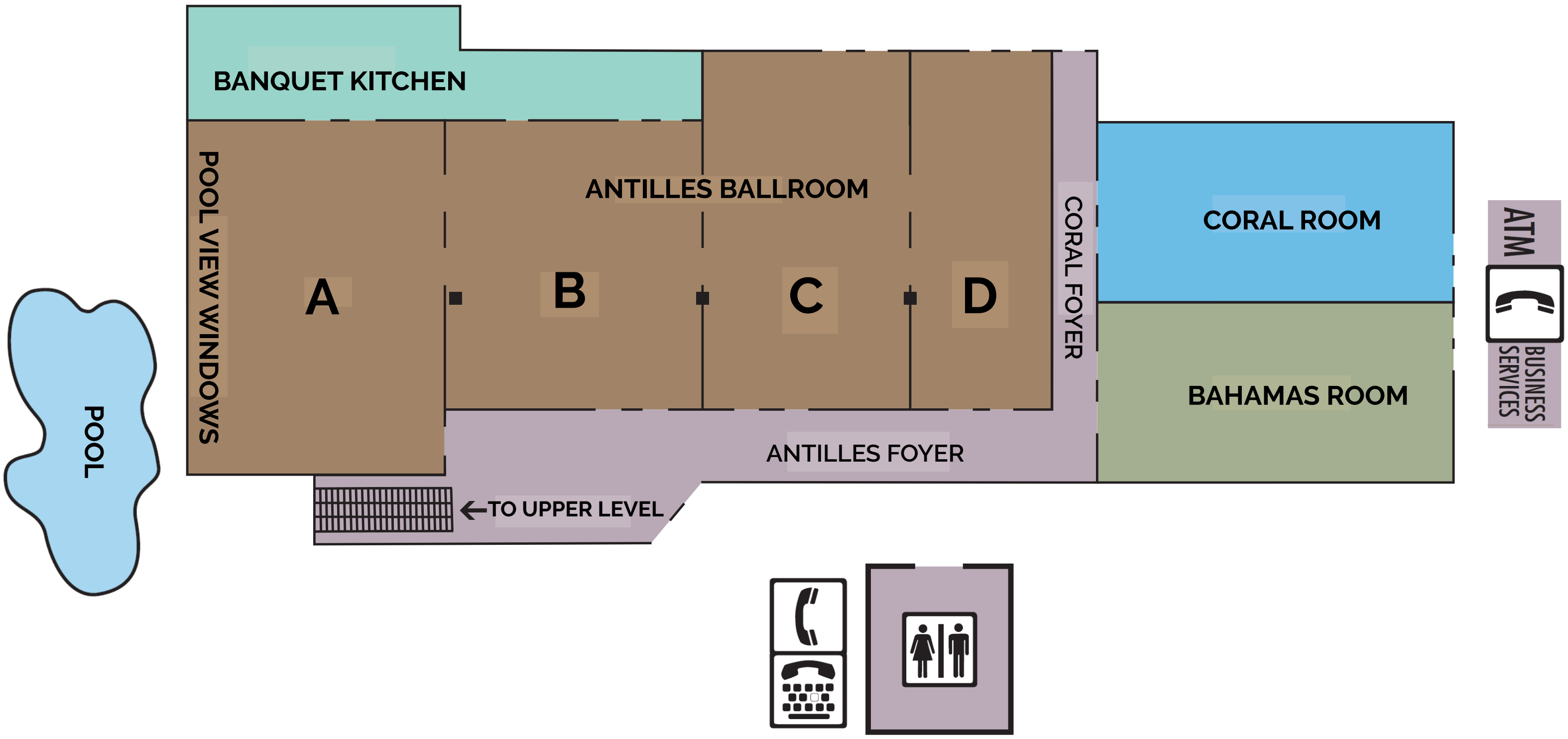
Treasure Island Convention Internet Details

Instructions:

1. Open your Network Connection on your computer.
2. Connect to the network with the SSID of AASC
3. Enter password: AASCSPEW44
4. Then open a web browser. You will be automatically redirected to the appropriate login page where you can enter the login code: SPEW44

LOWER LEVEL | POOLSIDE



AASC

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