



# AASC

AMERICAN ASSOCIATION OF  
SETTLEMENT CONSULTANTS

## CONFERENCE SCHEDULE

### Tuesday February 8, 2022

- 12:00pm-5:00pm **AASC Board of Directors & Committee Meetings**
- 12:00pm-5:00pm **Alliance for Women Welcome Brunch & Hospitality Cabana Open**
- 4:30pm-6:00pm **AASC PAC Donor Reception**
- 6:00pm-8:00pm **Welcome Reception**

### Wednesday February 9, 2022

- 7:00am-8:00am **Breakfast**
- 8:00am-8:30am **Welcome Remarks from AASC Board President Rebekah Reedy-Miller**
- 8:30am-10:00am **Trusts & ABLE Accounts Roundtable Discussion**  
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:
- Jay Scarola, Sage Settlements Consulting
- Speakers:
- Jayme Doyle, Legacy Enhancement Trust
  - Aynsley Comer, Capital First Trust Company
  - Rich LaBelle, FND Trust Services
- 10:00am-10:15am **Break**
- 10:15am-11:15am **Mediation: Adding Value Along the Settlement Path**

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:

- Hon. John P. DiBlasi, National Arbitration and Mediation (NAM)
- Ryan Garrison, JCR Settlements
- Jodie Lamb, Arcadia Settlements Group

11:15am-12:00pm

### **Washington Update and Legislative Outlook for 2022**

AASC's lobbyist and the Legal/Governmental Committee co-chairs will provide an update on potential legislative implications for the structured settlement industry. The presenters will also discuss ways AASC members can serve as effective advocates and help with the AASC Legislative Agenda.

Moderator:

- Jennifer Wieroniey, AASC

Speakers

- JD Raffaeli, 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**

1:30pm-2:30pm

### **Plaintiff Attorney Roundtable**

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

Speakers:

- To Be Announced

2:30pm-2:45pm

### **Break**

2:45-3:45pm

### **Fee Deferrals and Non-Qualified Structures**

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

**Break**

4:00pm-5:00pm

**Medicare Set-Aside (MSA) Best Practices**

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
- Rich Bass, Saber Solutions
- Randy Levine, ESS Settlement Services

6:00pm-8:00pm

**Convention Party**

9:00pm-12:00am

**Inaugural President's Party**

**Thursday February 10, 2022**

7:00am-8:00am

**Breakfast**

8:00am-8:15am

**Welcome Back from AASC President Rebekah Reedy-Miller**

8:15am-8:45am

**Innovation in the Settlement Space: NextGen Structured Annuity and Mass Tort Solutions**

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 settlement. 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 clients' funds.

Speakers:

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

8:45am-9:45am

**Settlements/Coverage: Navigating Sexual Assault Cases**

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
- Melissa Baldwin, Baldwin Settlements

9:45am-10:45am

**Working with the Defense on Plaintiff Strategies**

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
- Jeremy Babener, Structured Consulting
- Louis Masry, Sage Settlement Consulting

10:45am-11:45am

**Using Qualified Settlement Funds (QSFs) as a Settlement Tool for the Plaintiff and Defense**

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 from AASC President Rebekah Reedy-Miller**