



Society of Settlement Planners

2016 Annual Educational Seminar

Tucson, AZ

Thursday, March 10th	<i>Cocktail Reception Upper Terrace</i>	5:30pm-7:30pm
Friday, March 11th	<i>Breakfast Catalina Salon L</i>	7:30am-8:30am
<i>Room: Catalina Ballroom</i> <i>Neil Johnson</i>	Introduction	8:30am-8:45am
<i>Joe Tombs, Charly Schell, Joe DiGangi, Tim Denehy</i>	Comprehensive Settlement Planning: Unique Ideas, Tools, and Practices that Really Work!	8:45am-10:00am
<i>Break</i>		10:00am-10:15am
<i>David Childers, Jeremy Babener</i>	Q&A: Rules that Apply to Insurance Brokers	10:15am-11:00am
<i>Craig and Josephine (Grillo) Sullivan</i>	Grillo: A Wake Up Call	11:00am-11:40pm
<i>Mark Wilson (via Skype), Patrick Hindert</i>	Mraz: Lessons Learned	11:40am-12:15pm
<i>Lunch</i>	<i>Catalina Salon L</i>	12:15pm-1:15pm
<i>John Darer</i>	Sudden Money: Settlement Planning with an Elephant in the Room	1:15pm-1:55pm
<i>PacLife – Martha Hunt</i> <i>BHG – John Arendt</i> <i>FCST – James Creel</i> <i>IFS – Chris Shumate</i> <i>NeuLife – Michael Upchurch</i> <i>Legal Structures – Rick Miller</i>	Thinking Outside the Box: Alternative Products <ul style="list-style-type: none">- Convertible Deferred Lump Sums- Index-Linked Structure- Reinsurance Solutions- Trust Solutions- Attorney Fee Innovation- Brain Injury Solutions- Equity Indexed Solutions	1:55pm-3:05pm
<i>Break</i>		3:05pm-3:20pm

<i>Anthony Prieto</i>	Borrowing Troubles or Adding Value Proposition: Settlement Planners Role in Medicare Compliance, Entitlement Planning, and Lien Resolution Issues	3:20pm-3:50pm
Room: Salon B,C <i>Joe Tombs, Jack Meligan, Frank Johns</i>	Joint Session with ASNP & SSP Use of Structured Settlement Annuities & Special Needs Trusts in Settlement Planning	4:00pm-5:30pm
Joint Cocktail Reception with ASNP & Food	Coyote Corral A <i>*Remember to bring SSP badge to receive drinks*</i>	5:30pm-7:30pm
Saturday, March 12th	Breakfast Catalina Salon L	7:00am-8:30am
Room: Catalina Ballroom	SSP Annual Membership Meeting	8:00am-8:30pm
<i>Eddie Stone</i>	ELNY & Factoring Industry Lawsuits	8:30am-9:00am
<i>Paul Valentine</i>	Small Businesses: Legal Strategies to Help Maximize and Monetize	9:00am-9:30am
<i>Jeremy Babener</i>	Tax Savings: Missed Opportunities at Settlement	9:30am-10:00am
Break		10:00am-10:15am
Jeremy Babener	Taxation of Foreign Assignment Companies	10:15am-10:45am
<i>Patrick Hindert</i>	What do Plaintiff Attorneys Really Think About Us? (A Hint from the NSSTA Survey)	10:45am-11:30am
<i>Jack Meligan</i>	RSP Graduates	11:30am-11:45am
<i>Joe Tombs</i>	Closing and Intro 2016 SSP Board Members	11:45am-12:00pm