

2020 Annual Conference Agenda

2020 Vision: The Settlement Planning Profession Coming into Focus

Wednesday, February 26	Cocktail Reception - La Chinoiserie B (Floor 23)	5:00-7:00pm
Thursday, February 27	Breakfast - Boardroom, Palm Court & Library (Floor 2) Sponsored by Capital First Trust Company	7:00-8:00am
All Conference Sessions - The Gallery (4th Floor)		
Past — Reflection of the Past 20 Years		
Joe Di Gangi	Opening Remarks	8:00-8:30am
Joe Di Gangi	History of the SSP: Celebrating 20 Years	8:30-8:45am
Present — Where We're At Now		
Pat Hindert	Settlement Planning: Striving to Become a Profession	8:50-9:35am
Break		9:35-9:45am
SSP Board Members	SSP Practice Standards Highlight	9:50-10:05am
John Arendt, Chris Bua, Andrew Fisher; Moderator: Paul Lesti	Growing Your Practice with Non-130 Transactions	10:10-10:45am
Joe Tombs	Increasing Your Credibility Through Credentials	10:50-11:20am
Carole Neff, Stacy Scrip	SNT Discussions: Experts Weigh In	11:25-12:05pm
Joe Di Gangi	SSP Game Show Quiz #1	12:05-12:15pm
Lunch	Lunch - Boardroom, Palm Court & Library (Floor 2) Sponsored by Independent Life	12:15-1:15pm
Joe Di Gangi	Presenting Settlement Solutions In "Their" Lane	1:20-1:35pm
Joe Di Gangi	SSP Game Show Quiz #2	1:35-1:50pm
SSP Board Members	SSP Practice Standards Highlight	1:55-2:10pm
Scott Bayer, Joe Di Gangi	Using Tech to Grow Your Business I: Group Case Study	2:15-3:15pm
Break		3:15-3:25pm
Joey Di Gangi	Using Tech to Grow Your Business II: Digital Content Strategy	3:30-4:00pm
Joanne Marcus, Will Lindahl, Denise Lettau, and Evelynn Passino; Moderator: Sean Pendray	Pooled Trusts: When and How to Use Them In Your Planning	4:05-4:45pm
Joe Di Gangi	SSP Game Show Quiz #3	4:50-5:00pm
John Stone, Joe Di Gangi	Product Knowledge and Blending	5:00-5:40pm
SSP Members	Annual Meeting	5:40-6:00pm
Cocktail Reception	La Chinoiserie B (Floor 23)	6:00-8:00pm
Friday, February 28	Breakfast - Boardroom, Palm Court & Library (Floor 2)	7:00-8:00am
All Conference Sessions - The Gallery (4th Floor)		
Future — Where We Are Headed		
Rob Wellendorf, Phil Vogel, Ryan Garrison, Paul Isaac Jr.; Moderator: Joe Di Gangi	Succession Planning: For Attorney Clients and For You!	8:00-9:00am
Jeremy Babener	Taxes: What's Changing & What's Not	9:05-9:45am
Break		9:50-10:00am
Jack Meligan, John Stone, Ryan Garrison, and Anthony Prieto; Moderator: Rhonda Bentzen	Useful Tips for Marketing a Practice	10:05-10:50am
Open Mic; Moderator: Joe Tombs	Open Mic: Settlement Planning in the Next 20	10:55-11:15am
Rob Wood and Glen Armand	Qualified Settlement Funds: Advances and Updates	11:15-12:05pm
Joe Di Gangi	Closing and Intro of 2020 SSP Officers and Board Members	12:05-12:15pm