

2021 Annual Conference Agenda

Virtual Conference - February 23-25, 2021

Tuesday, February 23		
Joseph Di Gangi, CFP, CSSC	Welcome: Plaintiff Advocacy And Planner Tool Kit	10:00-11:00am
Samantha Webster; Eric SoHayda, CSSC; Stephen Halterbeck, RSP; Betty Gregware	Life Company Basics: Approved Lists, Co-Brokers & Other Guidelines	11:00-12:00pm
Paul Isaac, Jr.; Julian Gray, Esq., CELA; David Banas, Esq.; Shannon Laymon-Pecoraro, Esq.; Stacy Scrip, RSP, CTFA	Preserving Needs-Based & Government Benefits	11:00-12:00pm
Jake Duvall; John Stone, CFP, RSP; Patrick Hindert	Settlement Planning in the Best Interests of the Client	11:00-12:00pm
Joseph Di Gangi, CFP, CSSC	Advanced Planning: Blending Products for Long-Term Protection	12:00-1:00pm
Paul Isaac, Jr.; Thomas Begley; Ciara Koba, Esq.	Medicare's Interest in the Plaintiff's Settlement: Medicare Set-Asides	12:00-1:00pm
Les Marsh; Andrew Cook; Glen Armand	Qualified Settlement Funds and Practical Use Cases	12:00-1:00pm
Anthony F. Prieto, Jr., CFP; John Stone, CFP, RSP; Joseph Di Gangi, CFP, CSSC;	Role Play Case Study - Approaches Across the Planning Spectrum	1:00-2:00pm
Wednesday, February 24		
Joseph Tombs, JD, MBA, CLU, ARM, CFP, ChFC, RSP; Joseph Di Gangi, CFP, CSSC	Advanced Credentials: Becoming a Registered Settlement Planner (RSP)	10:00-11:00am
Kevin Swenson; Lincoln Combs; Ryan Garrison	Demystifying the Mass Tort Market: An Attorney's Perspective of Planner Value	11:00-12:00pm
Jeremy Babener, Esq.; Robert Wood, Esq.	Evolving Tax Law & Increasing Net Settlements	11:00-12:00pm
Andrew Cook; Cameron Lindahl; Stacy Scrip, RSP, CTFA;	Pooled Trusts, Special Needs Trusts, Custodians & Trustees	11:00-12:00pm
Sean Bentzen, Ph.D.	Avoiding Predatory Practices in the Factoring Industry & How to Protect your Clients	12:00-1:00pm
Paul Isaac, Jr.; Andrew Fisher; Greg Micoletti, CSSC, MSCC; John Meaney, CSSC	Deferred Compensation for Trial Attorneys & Advanced Annuity Options	12:00-1:00pm
Serena Fitchard, Esq.; Dan Finn; Christopher Bua, J.D.; Rick Miller	Emerging Market Spotlight: Non-Qualified Sales	12:00-1:00pm
Melissa Nickson; Hon. Emil Giordano; Joseph Di Gangi, CFP, CSSC	Judiciary Panel: Planning from The Court's Perspective	1:00-2:00pm
Thursday, February 25		
Jack Meligan, RSP, BCFE, MSCC, CMSP-F; Joseph Di Gangi, CFP, CSSC;	Increasing Revenue Outside Of Planning, And Building A Well-Rounded Network	10:00-11:00am
Paul Isaac, Esq., ChSNC; Jeremy Babener, Esq.; Jack Meligan, RSP, BCFE, MSCC, CMSP-F; Jason Lazarus, J.D., LL.M, CSSC, MSCC;	Adding Value: Protecting the Attorney's Practice	11:00-12:00pm
Paul Isaac, Jr.; Kent Hansen, JD, MS; Hon. Emil Giordano; Joseph Di Gangi, CFP, CSSC; Jay Robert, Esq.; Anthony Alfieri, JD, RSP	Planning Alongside Guardian Ad-Litem & Elder Law Attorneys	11:00-12:00pm
Ben Finadaca; Ryan Garrison	Marketing for the Modern Planning Practice: Proven Techniques & Innovative Trends	12:00-1:00pm