



Society of Settlement Planners

2019 Annual Conference

Charleston, South Carolina

Sunday, February 24	<i>Cocktail Reception – Lobby Bar Area</i>	5:00-7:00pm
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Monday, February 25	<i>Breakfast – Carolina A Ballroom All Conference Sessions – Gold Ballroom</i>	7:00-8:00am
Joseph Tombs	The State of the SSP / RSP Program Update	8:00-8:20am
Ann-Marie Campbell, Paul Ramos	Case Management and Life Care Planning	8:20-9:00am
Paul Isaac	Lien Resolution for Settlement Planners	9:00-9:45am
<i>Break</i>		9:45-10:00am
Sean Coleman, Pat Hindert	Structured Settlements: How a Transitional Market is Helping to Define and Grow Personal Injury Settlement Planning	10:00-11:00am
Serena Fitchard	Structures: Product Update	11:00-11:30am
Panel of Sponsors	Sponsor Spotlights: What Settlement Planners Need to Know	11:30-12:30pm
<i>Lunch</i>	<i>Carolina A Ballroom Sponsored by Capital First Trust Company</i>	12:30-1:30pm
John Stone	Building Blocks for an Effective Settlement Plan	1:30-2:15pm
Panel	How to Present a Settlement Plan	2:15-3:15pm
Earl Nesbitt	Dealing with a Secondary Annuity Purchase That Has Gone South	3:15-4:00pm
<i>Break</i>		4:00-4:15pm
Robert Sagrillo	Medicare Secondary Payer Compliance in Liability Claims	4:15-5:00pm
SSP Members	SSP Annual Membership Meeting	5:00-5:30pm
<i>Cocktail Reception</i>	<i>Lobby Bar Area</i>	5:30-7:00pm

Tuesday, February 26	<i>Breakfast – Pre-Function Gold Room Sponsored by Independent Life</i>	7:00-8:00am
Joseph Di Gangi	Fiduciary Standards / SSP Practice Standards / Best Practices	8:00-8:30am
Chris Bua, Todd Hagely, Michael Upchurch	The Independent Life Story	8:30-9:00am
Jason Squire, Matt O'Brien	Secure File Sharing and Secure Email	9:00-9:45am
Jeremy Babener	Taxation: Plaintiffs and Planners	9:45-10:30am
<i>Break</i>		10:30-10:45am
Karen Crider	The Basics of ABLE Accounts	10:45-11:30am
Joseph Tombs	Kiddie Tax: Analysis and Pitfalls	11:30-12:00pm
Joseph Di Gangi	Closing and Intro of 2019 SSP Officers and Board Members	12:00-12:15pm