American Association of Settlement Consultants

Virtual Conference

December 4 & 5, 2024

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**Wednesday, December 4**

12:00-12:05pm Welcome Joanna Wynes

12:05-12:55pm **Market-Based Structured Settlements** Josh Farmer

Brad Cantwell

Brian Schachter

12:55-1:00pm Break

1:00-1:50pm **Moral Matters: Ethical Dilemmas in Structured Settlements** Marcy Espinoza-Hanson Chad Ettmueller

1:50-2:20pm Initial Client Meeting: Building Trust and Understanding Needs George Audi

Jennifer White

2:20-3:00pm **Holistic Settlement Planning for Consultants for Client Success** Jake Duvall

Joe Tombs

Shannon Laymon-Pecororo

**December 5, 2024**

12:00-12:05pm Partner Member videos

12:05-12:30pm What's happening at the AASC? Joanna Wynes

Brian Schachter

David Vaclavik

Randy Levine Colin Finn

12:30-1:20pm **Optimizing Settlement Dollars: Leveraging Diverse** Jake Duvall

**Investment Products for Maximum Results** Joe Tombs

Shannon Laymon-Pecororo

1:20-1:25pm Break/Partner videos

1:25-1:30pm Reflections & Updates Joanna Wynes

1:30-1:35pm Partner videos

1:35-2:05pm Insights from the Experts: An Interactive Q&A for New Consultants Louis Masry

Taylor Alexander

Len Blonder

2:05-3:00pm **Mastering Complex Settlements: Navigating Tax Challenges** Robert Wood

**and Resolving Disputes between the structured settlement** Scott Freeman

providers and the attorneys involved in the case Kristin Neerhof

*Subjects listed in bold are being pursued for continuing education credits.*