



NSSTA Committees *Overview*



Get To Know Your NSSTA Committees

Presented by: The NSSTA Women's Caucus

- PAC Board
- CSSC Committee
- Innovation Committee
- Legs and Regs Committee
- Education Committee
- Legal Committee
- Membership Committee
- Marketing Committee

National Structured Settlements Trade Association NSSTA PAC Board

The PAC Board is a very organic, grassroots movement, whose goal is to increase the number of NSSTA contributors, regardless of the contribution amount. To a large extent, there has been success, mainly through email outreach, and a very active and engaging presence at NSSTA meetings. Chris Larned is a consistent PAC contributor as well as active in Take The Hill initiatives. Chris Shumate brings years of credibility from his work with Congressman Brady, and Porter Leslie's relationships through Ametros is helpful in engaging companies who historically are not active contributors. Recently, both Christi Fried and Matt Ross were added to the NSSTA PAC Board.

Networking with local congressional delegation is prioritized and NSSTA members are encouraged to do the same. For the people who follow politics, it's exciting!

When NSSTA wants to support a particular Member of Congress, NSSTA PAC seeks out brokers who live in their district to attend and support them. Everyone on the PAC Board participates in and encourages others to join the "Take the Hill" campaigns.

NSSTA PAC Board members need to be self-starters and it's helpful to be actively present in the industry.

NSSTA PAC Board Members:

Chair: Colin Finn – Alliant
Co-Chair: Chris Larned - Arcadia
Henry Strong – JMW Settlements (NSSTA BOD liaison)
Matt Ross – Ringle
Chris Shumate – IFS Companies
Porter Leslie – Ametros
Christi Fried – Continental Trust Services

National Structured Settlements Trade Association CSSC Committee

NSSTA formed the CSSC Committee for the purpose of establishing and administering the CSSC and MSSC certification programs. The Committee has primarily focused on developing course agendas and coordinating the presentation of that material with the CSSC program educational partner, the University of Notre Dame, Mendoza College of Business Executive Education unit in South Bend, Indiana. Recently Notre Dame announced the cessation of all executive non-degree programs, thus necessitating a reevaluation of the CSSC program content along with embarking on an effort to find a suitable replacement university partner for NSSTA.

The Committee will now center its efforts around determining and verifying the best course content for the program.

CSSC Committee Responsibilities – Chair, Co-Chairs and Members:

The Co-Chairs coordinate activities with the NSSTA Board liaison and determine the goals for the Committee during the upcoming year.

Co-Chairs – identify, select and recommend new members of the committee from the NSSTA membership to the Board liaison and in turn those recommendations are presented to the NSSTA Board for approval.

Co-Chairs establish Committee in-person meetings, conference or video calls and coordinate the logistics for conducting these events. Notes, files, and other key information are maintained by the Co-Chairs.

Reports of these meetings are provided to the NSSTA Board liaison and if requested reports are made to the Board on the committee's work.

The Co-Chairs identify potential committee members based on obtaining a diverse background of experience, previous educational and career achievements along with geographic, agency, life company representation and other qualifying factors. The Committee's goal is to have energetic and engaged representation from the industry offering various ideas, perspectives and opinions about how to make the CSSC program as relevant for the membership as possible.

The committee's current efforts center on two major fronts: (1) reviewing the course content and considering what topics the future CSSC program should cover and (2) identifying, interviewing and recommending a suitable university replacement for our long standing relationship with Notre Dame. *As of May 2021, the Committee has identified and obtained BOD approval for the University of Texas – Austin to host future CSSC programs.*

The committee works closely with NSSTA staff and our Board liaison.

The committee seeks to coordinate and inform other NSSTA committees (especially the Education committee) on its efforts and believes that having a well-coordinated offering of educational opportunities for the NSSTA membership is a major goal.

During the upcoming time frame, the CSSC Committee will finalize a suggested updated course content along with a recommendation for presentation of that material by a combination of instructors affiliated with the new educational partner as well as from the settlement industry and other subject matter experts. Additionally, the committee will consider the merits of testing as part of the CSSC process and possible continued education opportunities for current holders of the CSSC certification.

The committee will finalize its search efforts, complete all interviews and make recommendations through our Board liaison to the NSSTA Board by the end of 1Q21. *The BOD has formally approved our new host university.*

In 2021, the Co-Chairs and the committee will also re-visit the purpose and goals for the MSSC program and entertain new ideas from the membership about the program as well as possible new formats. This effort will follow the committee's immediate CSSC-oriented tasks and the MSSC evaluation could begin after 2Q21.

The Co-Chairs will serve their remaining time and will cycle off the committee as planned in coordination with the BOD liaison.

CSSC Committee Members:

Co-Chair: Chris Shumate

Co-Chair: Jordan Bossler

NSSTA Board Liaison: TBD

Sallye Barnes

LeAnne Burchik

Les Carrier

Erin Eddy

Betty Gregware

Serena Fitchard

Dan Goodmann

Geoff Hunt

Patrick Hindert

Eric Mikulaninec

Ndeto Mwose

Jeanne Ragusa

Toni Warbington

Bill Wright

National Structured Settlements Trade Association Innovation Committee

The Innovation Committee is a “THINK TANK” committee. Currently it is discussing/working on FECA, a white paper to benefit the industry, a Suze Orman endorsement, the PTSD initiative, SSDI/Ticket to work program; LMSA’s and the new Stakeholder Engagement project. The committee’s objective is to find opportunities to expand the use of structured settlements with the goal of growing industry revenue.

Innovation Committee Members:

Chair: Ann Marie E. VonBank

Board Liaison: Greg Micoletti

Brian Annandono

John Arendt

Len Blonder

Chris Bua

Brad Cantwell

Robert Caples

Ted Cranius

Robin Young Ellis

Dan Goodman

Chris Harlan

Geoff Hunt

Jeff Klugerman

Dave Korch

Christine Logan

Kathy Martin

Spooner Phillips

National Structured Settlements Trade Association Legs & Regs Committee

The purpose of the NSSTA Legislative & Regulatory Committee is to monitor national and state legislation that impacts the structured settlement space. Some of these initiatives include: workers comp settlement expansion, MSA's, ABLE accounts, the Affordable Care Act, and factoring. We also organize the Take the Hill initiative through our congressional outreach sub-committee.

Committee members, track specific house and senate bills as they move through the legislative process. Sub-committee members focus on some of our larger project initiatives. The co-chair, coordinates committee meetings and submits periodic reports to the NSSTA Board.

Legs & Regs Committee Members:

Co-Chair: Serena Fitchard

Co-Chair: Joseph Loseman

NSSTA Board Liaison: Peter Early

Len Blonder

Doug Brand

Scott Brown

Brad Cantwell

Cindy Chanley

Nate Evans

Margaret Heath

Dave Korch

Tacker LeCarpentier

Jeff Livingston

Christine Logan

Kathy Martin

John McCulloch

Johnny Meyer

Eric Mikulaninec

Ndeto Mwose

Kerri Poe

Natt Reifler

Jarrold Zea

National Structured Settlements Trade Association Education Committee

The Education committee's primary function is to prepare the session agendas for NSSTA meetings. Throughout the year, we solicit session topic ideas from our colleagues both in and outside our companies and share those ideas on our monthly calls. The session topic ideas are a reflection of current hot topics going on in our world like the session on COVID, current industry topics, a glimpse into what is going on on Capitol Hill, etc.

On our monthly calls, we talk over the session topic ideas, get input on each topic from the committee members and decide collectively on which topic should be placed on the annual or fall agendas. We keep a pipeline of topic ideas and our goal is to keep that pipeline full at all times.

The time commitment about 1 hour each month for conference calls and then the time it takes for you to think of to solicit session topic ideas from your colleagues.

Education Committee Members:

Co-Chair: Carol LaFollette

Co-Chair: Connie Klingler

Co-Chair: Jeff Klugerman (moving off)

Co-Chair: Harry Coleman (moving off)

NSSTA Board Liaison: Ravi Vaswani

William Bonomo

Michael Burton

Harry Coleman

Ryan Garrison

Shawn Keefe

Jim Klapps

Connie Klingler

Cameron Lindahl

Stacy McCall

Richard Rendon

Jim Rothwell

Brian Smith

Angel Viera

Toni Warbington

National Structured Settlements Trade Association Legal Committee

The Legal Committee is responsible for keeping NSSTA members and the Board up to speed on all legal issues facing the structured industry as a whole, including:

- (i) legislative activity and changes in the law re: sales of structures, SSPAs, tax provisions, etc.;
- (ii) court activity/litigation/court decisions/pending lawsuits surrounding structured settlement-related cases (the depth and breadth of the issues in these cases being vast and specific, depending);
- (iii) secondary and tertiary market activity, fraudulent activity, and so forth;
- (iv) Medicaid, Medicare, ABLE, and other government issues that relate directly to structures; and
- (v) any other legal issue that the organization might be facing or dealing with. We are formulating sub-committees related to innovation. Likewise, we are in the process of developing a new mission statement to better define the Legal Committee's role, and what future role(s) it will play within the organization, specifically as it relates to encouraging the overall growth of the structured industry and how the committee will support the industry from a legal perspective.

Legal Committee Members:

Co-Chair: Steve Harris

Co-Chair: Sandy Jones

Co-Chair: Brennan Neville

Board Liaison: Len Blonder

Steven Brancato

McKale Crawford

Betty Gregware

Pat Hindert

Ethan James

Joshua Kass

Jim Klapps

Paul Lesti

John McCulloch

Mike Miller

David Nelson

Thomas Neumeier

Timothy O'Driscoll

Chris Phanco

Melanie Rose

Trish Sandberg

Jennifer Smith

Mary Jo Stafford

Susan Stauss

Craig Ulman

Joe Wolfson



MEET THE COMMITTEES: MAY 2021

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National Structured Settlements Trade Association Membership Committee

The Membership Committee is the gatekeeper for our association. New membership applications are reviewed to make sure they fit into one of NSSTA's membership categories. The committee researches the applicant to see if s/he is engaged in the industry and/or whether s/he is engaged in any activity deemed incompatible with our by-laws or mission and why they want to join NSSTA. After the applicant is vetted, all members of the committee reach agreement on its recommendation to the Board to accept or reject the application.

Periodically, the membership category definitions are reviewed, and research is conducted to determine if a new membership category is needed, such as the subset of Producer to include administrative personnel that was added last year.

Periodically, the Board will ask the committee to evaluate the dues structure for the association as well as the guidelines for who should pay dues, such as part-time Consultants of a firm. Additionally, the committee researches and determines if individuals or firms have run afoul of any membership guidelines in the by-laws. At times, this requires discussions with NSSTA's counsel.

The committee reports to its Board liaison who serves as the communication bridge between the Board and the committee.

Typically, Eric or Debbie share with the committee the new membership applications or requests from members who want to change their membership category. Applicants are contacted by the committee as soon as possible, usually within one to two days and once the committee agrees on a recommendation, it is passed on to the Board liaison to discuss with the Board.

Membership Committee Members:

Chair: Jim Ebel

Co-Chair: Paul Marshall

NSSTA Board Liaison: Ryan Jandreau

Maureen Flood

**National Structured Settlements Trade Association
Marketing Committee**

Mission Statement:

The Marketing Committee was established to support the comprehensive marketing and communication strategy of the NSSTA for the purpose of messaging, awareness, and branding. The committee assists the NSSTA leadership by supporting marketing campaigns, promoting events, and posting on various social media platforms the benefits of proper settlement planning and structured settlements consistent with the NSSTA organizational goals and objectives.

Member Responsibilities:

- Participate in scheduled Committee meetings.
- Maintain up to date contact information with Committee.
- Submit Committee membership interest to the NSSTA BOD Liaison.
- Consult with the NSSTA BOD on short term and long-term marketing needs.
- Support and implement the NSSTA marketing and communications strategy through:
 - Continued development of the NSSTA website; ensuring relevant and current content, including print and digital media such as brochures.
 - Reviewing website analytics to improve online visibility.
 - Engaging the NSSTA membership through various media channels.

Marketing Committee Members:

Kevin Silo, Co-chair

Ryan Christen Oliphant, Co-chair

Lu Ann Reeb, NSSTA Marketing & Communications Director

Tacker LeCarpentier, NSSTA Board Liaison

Chris Chan

Andrew Fisher

Alicia Jackson

Gina McCall

Mark Narby

Kim Smith

(as of May 7, 2021)