## Agenda

### Sunday, May 6, 2018

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>4:00 PM - 6:30 PM</td>
<td>Registration Open</td>
</tr>
<tr>
<td>5:00 PM - 6:30 PM</td>
<td>Welcome Networking Reception</td>
</tr>
</tbody>
</table>

Welcome to Washington, DC! Attendees are invited to meet and mingle as we kick off the 24th Annual Spring Life Settlement Conference. This will be an amazing start to a spectacular event that you will not want to miss!

**Sponsored by**

---

### Monday, May 7, 2018

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 AM - 5:00 PM</td>
<td>Registration Open</td>
</tr>
<tr>
<td>7:00 AM - 8:00 AM</td>
<td>Breakfast</td>
</tr>
<tr>
<td>8:00 AM - 8:15 AM</td>
<td>Opening General Session</td>
</tr>
<tr>
<td></td>
<td>Greetings from DC! The Opening General Session will begin the Spring Conference education and will include valuable insights from association leaders.</td>
</tr>
<tr>
<td></td>
<td><strong>Speakers:</strong> Darwin Bayston, Dan Young</td>
</tr>
<tr>
<td>8:15 AM - 9:00 AM</td>
<td>Playing Offense: How LISA’s Regulatory Program is Working for You</td>
</tr>
<tr>
<td></td>
<td>Since its inception, LISA has been the leader in promoting responsible legislation and regulation in the life settlement industry. An important aspect of government relations includes building lasting relationships with public policymakers and their staff. In late-2016, LISA began a relationship with Nelson Taplin Goldwater (NTG), a premier insurance consultancy firm that provides representation before state insurance regulators, legislators and Governors. Since engaging NTG, our regulatory program and message have evolved. NTG’s Co-President Derek Wooley will discuss how LISA’s game plan has shifted from reactive to proactive, and how LISA and NTG have been successful in promoting the life settlement market and the protections it affords consumers, and why this is a good thing for you.</td>
</tr>
<tr>
<td></td>
<td><strong>Speakers:</strong> Derek Wooley</td>
</tr>
<tr>
<td>9:00 AM - 9:45 AM</td>
<td>How Congress Plans to Address Retirement Security – and Other Thoughts from &quot;The Hill&quot;</td>
</tr>
<tr>
<td></td>
<td>It’s a fact: Most Americans are ill-prepared for retirement. Recognizing the importance of retirement security, initiatives have been launched by public and private entities and organizations, state legislators and regulators, as well as the Federal government, to promote education and innovation, as well as provide consumer protections. In mid-March, Rep. Mike Kelly [R-PA-3] introduced H.R. 5282, the Retirement Enhancement and Savings Act of 2018, which authorizes savings</td>
</tr>
</tbody>
</table>

---

(c) 2018. Life Insurance Settlement Association. All rights reserved.
mechanisms and other incentives to Americans, making it easier to save for retirement. Lori Prater, who serves as Policy Director and Tax Counsel for Congressman Kelly, will discuss the impact of pieces of legislation like H.R. 5282, as well as other initiatives by Congress as they seek to improve the retirement security of Americans.

Speakers: Lori Prater

9:45 AM - 10:30 AM  
Electronic Health Records: How they will revolutionize underwriting risk assessment
The objectives of this presentation will be to provide a brief overview of what electronic health records are, how they will replace traditional medical records (format/transactions/improved cycle times), and why they will be the most critical driver behind understanding patient/insured data, underwriting risk selection, and managing mortality risk in the future.

Speakers: Traci Davis

10:30 AM - 10:45 AM  
Morning Networking Break
Sponsored by:

10:45 AM - 11:30 AM  
Pointers & Pitfalls of Life Settlement Marketing
The life settlement industry is on target for rapid growth, so industry professionals need a sound marketing strategy to educate policy holders and their financial advocates. During this panel, Magna Life Settlements Chief Marketing Officer, R. Scott Harris, will share best practices on life settlement marketing as well as marketing strategy pitfalls that can be destructive to the entire industry. Walk away from this panel with tactics to implement – and avoid – in your life settlement marketing strategy.

Speakers: R. Scott Harris

11:30 AM - 12:30 PM  
Short Form Life Expectancies Are Becoming More Dominant
So-called short-form underwriting has always been a mainstay in the life insurance industry. Today similar methods are being employed by providers and investors to evaluate insureds. While the approaches may vary, the use of questionnaires, telephone interviews and other methods to either reduce the time-to-offer or otherwise streamline the underwriting process is a current trend. This moderated panel will discuss and debate the methods, utility, efficacy, benefits and shortcomings of these approaches as they relate to both origination and servicing in the life settlement industry.

Speakers: Chris Conway, Vince Granieri, John Collins, Steven Shapiro, Michael Fasano

12:30 PM - 1:30 PM  
Luncheon

1:30 PM - 2:15 PM  
The Value Proposition of being a member of LISA
LISA Membership has much to offer – whether you are just entering the life settlement market or building upon years of experience and seeking to benefit from the influence, activities and services of LISA and its members . Discover what LISA is doing to help you excel in the market.

Speakers: Darwin Bayston

2:15 PM - 3:00 PM  
Broker model plays a vital role to the growth of the industry.
The broker model of providing policy submissions to the life settlement marketplace is of vital importance to the integrity of the industry. In addition to fulfilling the fiduciary responsibilities of acting in the best interests of clients, life settlement brokers create the "auction" market that is essential to a competitive process that maximizes the value consumers receive for their policies.
3:00 PM - 3:15 PM  
**Afternoon Networking Break**
Sponsored by

3:15 PM - 5:00 PM  
**LISA Members' Only Meeting**
LISA Members will meet to elect the 2018-2019 Board of Directors and review 2017 financials for the association. Members' only cocktails sponsored by:

5:00 PM - 6:30 PM  
**Connect in the Capital Happy Hour**
Immerse yourself at this cocktail hour surrounding in the history and landmark splendor of America's Capital City while enjoying the unrivalled ambience of Washington, D.C.

5/8/2018 - 24th Annual Spring Life Settlement Conference - Agenda | Online Registration by Cvent

---

**Tuesday, May 8, 2018**

8:00 AM - 3:00 PM  
**Registration Open**

8:00 AM - 9:00 AM  
**Breakfast**

9:00 AM - 9:45 AM  
**Insurance Regulation and the Latest at the NAIC**
This session will provide an update on key initiatives underway at the NAIC. Discussion will include an overview of accomplishments of the past year as well as other key opportunities ahead.

**Speakers:** Heather Filers-Bowser

9:45 AM - 10:30 AM  
**A Wealth Advisor’s Experience & Perspective**
A wealth advisor's perspective on the industry based on his experiences, past and present, involving life settlements. Mr. Gottlieb will shares his experiences and provide insight as to his views on client perception of the transaction, interactions with market counterparties and the issues that impact his involvement with the marketplace.

**Speakers:** Gregg Gottlieb

10:30 AM - 10:45 AM  
**Networking Break**

10:45 AM - 11:30 AM  
**The Truth and Fiction about Life Settlements in Canada**
Paul Tyers, CPA, CFP – President and CEO of Canadian Life Settlements Inc. will provide an update on the emerging Life Settlement market in Canada. He will give attendees an overview of the regulatory environment, the senior's market, unique...
aspects of Canadian issued life insurance policies and how LISA members can participate in this emerging market for longevity assets.

**Speakers:** Paul Tyers

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Description</th>
</tr>
</thead>
</table>
| 11:30 AM - 12:15 PM | **An Update of Federal Tax Provision Changes: Reporting Requirements**<br>The recently passed 2017 Tax Cuts and Jobs Act contains provisions that change the way secondary life policy owners are taxed on the sale of their policy. The changes provide a significant benefit to the consumers and should increase the policy submissions for the life settlement market. The session will discuss the effects of the changes and provide the latest update on the specifics of details related to reporting and other issues.  
**Speakers:** Thomas D. Sherman, Mark H. Leeds |
| 12:15 PM - 1:15 PM  | **Farewell Networking Lunch**                                                        |
Darwin Bayston

Darwin Bayston is President and CEO of the Life Insurance Settlement Association (LISA). His charge is to extend the outreach of the Association to all participants of the life settlement industry from consumers to capital providers, including producers, brokers, providers and service providers who are part of the life settlement market. He was previously Managing Director of Life Settlement Consulting & Management (LSCM), founded in 2004 and specialized in life settlement policy and portfolio valuations, and life expectancy analysis. He has published several articles and participated as speaker at a number of life settlement conferences. Previous to that he operated an investment advisory firm. From 1980 to 1993, he served in several capacities, including President and CEO the CFA Institute (and its predecessor organizations). While at CFA, he founded the continuing education program, was editor of the CFA Digest and supervised research projects funded by the Research Foundation of the ICFA. He began his career as an investment analyst with a Midwest life insurance company. Mr. Bayston has been Chairman of the Martha Jefferson Hospital Foundation ($100 million), a member of the Hospital's Finance Committee and a past member of the Board of the Institute for Quantitative Research and Finance (Q Group).

James W. Maxson

Jim is an experienced attorney with more than twenty years of practice in the areas of insurance-linked securities, mergers and acquisitions, private placements, general corporate matters, insurance regulatory issues and life settlements. Jim serves clients in all aspects of insurance-linked securities and insurance capital markets. He has performed extensive work in the areas of licensing, regulatory compliance, fund-structuring and portfolio acquisitions. Jim was a partner in the Insurance Group of the Atlanta-based law firm Morris, Manning & Martin, LLP, and he is the only attorney in private practice who has actually run a life settlements company. Jim spent four years as the Executive Vice President, General Counsel and Acting Chief Operating Officer of a leading life settlement provider company where he was responsible for all compliance and legal matters, including interpretation of legislative and regulatory requirements and compliance with securities law. He was also a senior associate at a Paul Hastings, where he practiced in the areas of securities and mergers and acquisitions. Jim also served as a judicial clerk for the Honorable Alice M. Batchelder on the U.S. Court of Appeals for the Sixth Circuit. Jim is a frequent presenter on topics related to the life settlement industry. He is the previous Deputy Chairman of the European Life Settlement Association and was recently elected as Chairman of the Board of the Life Insurance Settlement Association, the oldest and largest association representing the life settlement industry.

Thomas D. Sherman

Tom has nearly 45 years of hands-on, results-oriented accomplishments in a wide variety of legal matters including mergers, acquisitions and joint ventures; SEC practice and compliance (Sarbanes-Oxley Act); commercial and employment law; equity and debt, public and private financings; general corporate law; litigation, including litigation management; and senior executive matters, including employment contracts, non-competition restrictions and severance agreements. Tom has demonstrated people, administrative and management skills including direct participation with boards of directors and senior executives of public and private business organizations in all aspects of their legal and business decision-making processes. A former First Lt. in the U.S. Army, Tom began his legal profession in Detroit, Michigan, as an associate in a private law firm. In 1983, he moved to Atlanta, Georgia where he has expanded his legal career and served as general counsel, vice president and secretary for two Fortune 500 companies.

Lori Prater

Ms. Prater currently serves as Policy Director and Tax Counsel for Congressman Mike Kelly (R-PA), a member of the Ways and Means Committee with jurisdiction over tax, trade and health care matters. In addition to serving on Ways and Means, Congressman Kelly is founder and co-chair of the House Retirement Security Caucus.

Having worked on Capitol Hill for more than a decade, Ms. Prater has worked as senior staff in both the U.S. House of Representatives and U.S. Senate for Members of Congress from California, Oregon, and Pennsylvania including Senator Gordon H. Smith (R-OR) as General Counsel, Congressman Jim Gerlach (R-OH) as Legislative Counsel, and Congressman Tom Campbell (R-CA) as Senior Legislative Assistant. She has also worked as the Director of Government Relation for the Information Technology Industry Council (ITI), a leading information technology trade association, representing the "top 50" high-tech companies in Washington, D.C.

Prior to working in the nation's capital, Ms. Prater worked at several universities in a research and teaching capacity. In 2002, she received her law degree from Santa Clara University School of Law in Silicon Valley, California. In Oregon, she received her bachelor's degree from the University Honors Program at Portland State University in 1993, and master's degree in Political Science from Portland State University in 1995.
Traci Davis

Traci Davis is Partner and Chief Underwriting Officer of ISC Services, LLC. Her experience in life insurance and life settlement underwriting roles includes a Sr. Management and Entrepreneurial focus with experience in technical underwriting and Chief Underwriting roles; expertise in developing new business (owning and operating underwriting services firms), most recently focused on New Business Development and innovative products to enhance value on behalf of our MIB membership and the life insurance industry. Prior technical and Chief Underwriting roles in the life insurance industry and adjacent markets, with underwriting expertise spanning over 30 years with blue chip life insurers, reinsurance carriers, and service providers.

Over five years of experience and expertise, including “hands on” project work, related to electronic health record (EHR) evolution including numerous industry related presentations. Industry related roles serving in multiple Life Underwriting Associations over my 30 year career; most recently serving as President of AHOU—the largest national/international association of professional underwriters.

Specialties: Electronic Health Records (EHR), Entrepreneurial acumen, professional industry presentations on underwriting and EHR revolution, innovative leadership, partnership development, operations management, building high performance teams, project leadership, impaired risk underwriting, affluent and senior market expertise, longevity and life settlement expert, litigation consultation, hospice experience.

Derek Wooley

Derek Wooley has over 15 years experience working as a consultant and public affairs professional in the insurance industry. Derek’s has deep roots in the industry, having worked at the Louisiana Department of Insurance, America’s Health Insurance Plans (AHIP), National Association of Insurance Commissioners (NAIC) and the Independent Insurance Agents and Brokers of America. Derek is originally from Louisiana – where he served as Executive Director of the Louisiana Democratic Party – and he now resides and works in Florida.

Heather Eilers-Bowser

Heather Eilers-Bowser is financial policy and legislative counsel at the National Association of Insurance Commissioners (NAIC). She represents NAIC members before Congress and federal agencies on insurance regulatory issues, including those relating to Dodd-Frank implementation, life insurance, annuities, tax, international matters, receivership and producer licensing.

Prior to joining the NAIC, Ms. Eilers-Bowser was appointed to the National Transportation Safety Board as chief advisor to Vice Chairman Robert Sumwalt. During her time there, she prepared and staffed Board Member Sumwalt for many accident investigations, public meetings, and hearings—notably, when he chaired the hearing concerning the famous US Airways Flight 1549 landing in the Hudson River. Prior to that, she worked for members of the U.S. House and Senate, including Senator George Voinovich (R-OH) and Representatives Greg Ganske (R-IA), Linda Smith (R-WA), and Ed Royce (R-CA). During her time on Capitol Hill, she helped frame the debate over privacy, especially during consideration of the Gramm, Leach, Bliley Act, among other legislative initiatives.

Earlier in her career, Ms. Eilers-Bowser acted as legislative counsel and director of federal relations for the National Association of Insurance and Financial Advisors. She holds a law degree from George Mason University School of Law and a bachelor’s degree in Humanities from Concordia College, Portland.

Paul Tyers

Paul Tyers is President of Canadian Life Settlements, registered with the Financial Services Commission of Ontario, and is the Managing Director of Wealth Stewards Inc., a financial services firm providing bespoke advice to high net worth clients. He is passionate about helping Canada’s seniors to utilize all of their assets, including their life insurance assets, to meet their lifestyle needs. To meet this objective his team provides life settlements and life advances to those who are over age 70, or who have a significant health impairment.

A Chartered Professional Accountant (CPA), Chartered Accountant (CA), Certified Financial Planner® (CFP) and Chartered Investment Manager (CIM), Paul has both the education and experience to provide comprehensive life settlement services. Paul is a voting member of U.S. - based Life Insurance Settlement Association and a director of Cdn.-based Life Insurance Settlement Association of Canada.

Upon the completion of a business degree at Wilfred Laurier University, Paul began his working at Thorne Riddell (now KPMG), gaining experience in a wide variety of business sectors. After obtaining his CA designation, he moved into corporate finance with the Bank of Montreal and subsequently with Corfinplance International, a boutique M&A firm specializing in mid-market debt financing. In 1987, Paul partnered with a venture capital firm to acquire Retirement Counsel of Canada (RCOC) and directed it through substantial growth prior to selling it in 2002. In 2003, Paul returned to his passion of building, managing and preserving the wealth of private clients.

His success is attributed to ensuring clients’ interests always come first. This was borne out when he was nominated as an ELITE Advisor™ for his service to clients and he and his team were Canadian winners of the 2017 Global Financial Planning Awards.
Paul co-authored the Canadian best-seller "Fiscal Fitness, Financial Planning for all Stages of Life" as well as a recent E-book for financial planning professionals called "Life Settlements: A Canadian Perspective".

In his spare time he enjoys many sports activities like skiing, tennis, squash and triathlons. He also volunteers his time with his church and other entities such as Leader Impact and Opportunity International.

---

**Gregg Gottlieb**

Gregg Gottlieb is a Certified Financial Planner™ professional (CFP®) with Regal Wealth Advisors. Gregg has over 20 years of experience in the financial advisory industry, developing and helping to implement financial plans for individuals and business owners. Gregg also has significant experience working with complex life and health insurance matters, strategically integrating them within comprehensive, tailored financial plans.

Gregg co-founded Regal Wealth Advisors in 2006 to help create a company dedicated to wealth development, preservation and transfer to subsequent generations. The combination of professional backgrounds and experiences at Regal Wealth Advisors, augmented by the significant resources available through the firm’s affiliations with Kestra Investment Services, LLC, enable Gregg to support his clients and their businesses throughout every stage of their lives.

His career began in the benefits industry, working with small and mid-sized institutional clients, and specializing in creating retirement plans and long-range financial planning for senior executives. In 1998, he established himself as a sole practitioner in Roseland, New Jersey, expanding his financial planning services to include health insurance, voluntary benefits, and estate planning. Gregg’s strong personal attributes – perseverance, creativity, and follow through - helped him develop a significant financial advisory practice. In 2002, Gregg commenced developing customized retirement plans and handling large life insurance transactions designed for wealth transfer and estate planning.

Gregg has served on the Board of Directors of the Zwickel Foundation and the Advisor Board of Aviva. He is a member of the Beth Shalom Temple (Livingston) and the Barton Creek Study Group. He also periodically speaks on financial planning topics to various organizations, including in the past, the MS Society and North Essex Chamber of Commerce.

Educated at Muhlenberg College, Gregg received his undergraduate degree in Human Resources. He later attended Fairleigh Dickinson University and completed its Certified Financial Planning Program.

---

**R. Scott Harris**

Scott is a compelling leader who executes change by using technology innovations to build relationships and make a difference. With 20-years of marketing experience, Scott is CMO at Magna Life Settlements, a multi-billion dollar alternative asset manager specializing in non-correlated investments. Scott is also Co-Founder of Social Factor, a national social media strategy & execution agency with a proprietary ROI-centric approach to social.

As volunteer Board Chairman of non-profit Young Life Greater Austin, Scott’s leadership has seen the relationship-based mentor program grow 6X to 50 schools, 1000 volunteer leaders, 35 staff, 2000 campers alongside thousands of Austin adolescents. Previously, as PGI VP Sales & Marketing, Scott built annual sales and lead revenue for the Global Online channel while directing 50+ millennials in four continents. Earlier, Scott served as Editor-in-Chief for Dell.com/Enterprise, founder/CEO of interactive dialogue software co. (acquired by SalesFusion), Product Director at Austin Ventures, and Sales/Engineer at Merck. He has a BS Engineering and MBA from The University of Texas at Austin.

---

**Jon Mendelsohn**

Jon B. Mendelsohn is co-founder and Chief Executive Officer of Ashar Group, LLC, a nationally licensed firm specializing in the Secondary and Tertiary markets. He has championed industry driven strategies to encourage innovation across the company’s businesses channels. Under his leadership, the Ashar team maintains their focus to provide an exceptional client experience. Deliberate decision-making has resulted in establishing national partnerships, collaboration, and the integration of Secondary Market solutions that deliver true value to Ashar's partners and clients.

---

**John Welcom**

John Welcom is one of the most experienced executives in the life settlement marketplace, working exclusively in the industry since 1993. Mr. Welcom founded Welcome Funds, Inc. in 2000, as a nationally licensed life settlement broker providing professional representation to life insurance consumers & their advisors, in the secondary market. The firm has since established itself as one of the most active and respected life settlement
companies in the industry. Welcome Funds ensures that a fair market value is secured for policy owners by negotiating with the top buyers in the secondary market who compete in an auction process to purchase policies. Since 2000, the firm has helped thousands of consumers uncover the living benefits of life insurance. Mr. Welcom is also the Founder & CEO of Welcome Life Financial Group, LLC, a family of companies that provides industry-leading solutions to all participants in the life settlement lifecycle, from producers & brokers to providers & institutional investors. Mr. Welcom graduated with a Bachelor’s of Business Administration in Economics from the University of Miami in 1993. John is also a licensed life agent and life settlement broker throughout the U.S. and holds the Series 6, 26, 63 & 99 Securities Registrations.

Rob Haynie

Mr. Haynie has been a major influence in the evolution of the life settlement industry during his seventeen-year career of proactive involvement. Not only has he been directly involved in negotiating and settling several thousand contracts, he currently serves on the Board of Directors of the (LISA), Life Insurance Settlement Association, in addition to serving as its Vice President for four years in the past. He has recently been recognized as one of the 10 most influential people in the Life Settlement Industry by his peers. Life Insurance Settlements, Inc., or LIS is uniquely qualified to shop Life Settlements as one of the original Life Settlement Broker companies and one of the largest submitters of Life Settlement policies in the business today. Additionally, he is a noted speaker, panelist and author or contributor on the topic of life settlements in various trade journals, periodicals and press outlets across the globe and serves on the customer advisory board of 21st Services as well as the Advisory Board of The Insurance Studies Institute. Mr. Haynie, an Alumnus of Florida State University, currently holds a Life Agent License with Viatical Settlement Broker Appointment for LIS. He currently resides in Fort Lauderdale, Florida with his wife of 13 years, Lauren and their identical twin daughters, Skyler and Brooke.

Chris Conway

For nearly 25 years, Chris has been a key executive in a number of life settlement businesses playing almost every imaginable role the industry has to offer. He has hired, trained, educated, advised, and guided some of the industry’s premier companies on both strategic and tactical levels. He has developed and managed business relationships in the US, Europe, Asia and Latin America. He has presented to insureds, investors, professional associations, and at industry functions around the globe. He has initiated, developed and managed relationships throughout the community of insurance, financial services, underwriting, capital markets, banking and other intra-industry service providers associated with life contingent assets.

Chris has a demonstrated track record for applying disciplined, critical thinking to everything he does. His success driven approach to managing life settlement operations is based on his personal involvement in actually doing the work required by each step in the life settlement process from policy sourcing to post-purchase administration and everything in between. He is familiar with and skilled in the development and use of systems, processes, procedures applicable to almost every facet of the business. As a result he is always focused on the bottom line. He is a detail-oriented, highly organized, strategic thinking entrepreneur willing to “walk-the-talk” and he knows what works and what doesn’t.

The life settlement industry is rich with opportunity for those willing and able to be truly entrepreneurial and opportunistic. As co-founder of LAA, Chris remains committed to the business and particularly to the evolution of the industry beyond the status quo. Having participated in most of the industry’s past, he remains focused on the future and dedicated to the continual pursuit of effective, efficient and profitable opportunities to grow LAA and the life contingent markets. Chris lives in Central New Jersey with his wife of over 20 years, their two children, and the family menagerie.

Vince Granieri

Vince Granieri is the founder and CEO of Predictive Resources, LLC, a Cincinnati-based consulting firm providing predictive modeling solutions to the longevity and healthcare management arenas. Predictive Resources boasts the most extensive life settlement product line in the industry, backed by experienced actuarial, clinical, underwriting, and IT resources. Predictive Resources is uniquely qualified to deliver single-source analytical, predictive modeling and software development packages. Its record of innovation is unparalleled. In five short years, Predictive Resources has become recognized as an expert in the longevity space, serving over 100 attorneys, brokers, investors, life settlement providers, lenders, asset servicers, trustees, and LE providers.

Vince earned his bachelor’s degree (summa cum laude) at Ball State University, majoring in actuarial science. He also holds an MBA from the Harvard Business School. He is a Fellow of the Society of Actuaries (SOA), Member of the American Academy of Actuaries (AAA), and an Enrolled Actuary under ERISA. He has served as CFO and/or Chief Actuary for many financial services organizations in his 35+ year career. He served on AAA task forces to develop the Actuarial Standard of Practice for setting mortality assumptions for life settlements (ASOP #48) and the associated Practice Note. He currently serves on the LISA Board of Directors as its treasurer. He also serves on the AAA Longevity Risk Task Force. He was elected to the SOA Predictive Analytics and Futurism Section Council and has been recognized by the SOA as a ‘Predictive Analytics Pioneer’. His peer-reviewed research papers on senior mortality were presented at two SOA ’Living to 100 and Beyond’ Symposia.

Dan Young

Mr. Young is a Senior Managing Director & General Counsel at Vida Capital. In addition to his role at Vida, Mr. Young is an adjunct professor of Regulatory Law at the University of Texas Law School, Chairman of the Board of the Institutional Longevity Markets Association (ILMA), Board
Mark H. Leeds is a Tax Transactions & Consulting partner in Mayer Brown's New York office. His practice is focused on the tax consequences of a variety of capital markets products and strategies, including over-the-counter derivative transactions, swaps, tax-exempt derivatives and strategies for efficient utilization of tax attributes—such as net operating losses. Mark advises on the tax aspects of capital markets, structured finance, derivatives, financial products and insurance transactions and has extensive experience working with both buyers and sellers to develop and structure complex derivatives. A significant portion of his work involves the taxation of financial products and trading strategies engaged in by banks and other financial market participants. He also advises on hedge fund and other investment vehicle formation matters. Mark is a former managing director and senior tax counsel with Deutsche Bank in New York. He also served as the general counsel of a credit derivative company and was a partner at Deloitte & Touche, where he led the capital markets tax practice. A frequent writer and speaker on tax topics affecting the capital markets, Mark is also the editor-in-chief of the monthly publication Derivatives: Financial Products Report.

John Collins

John Collins is the Vice President of Lyric Services, Inc. ("Lyric"), an active life settlements asset manager and advisor serving institutional investors. Lyric is actively engaged in all aspects of policy evaluation, trading and management, with a special focus on risk analysis, financial analysis and asset servicing. John has a 24 year business background with experience in life settlements, alternative investments, asset based lending, financial planning and analysis, operations, business development, accounting, auditing, and risk management. Since 2004, he has overseen the funding of over 450 life settlement related transactions representing a face amount of over $3.4 billion. He has extensive contacts throughout the life settlement industry and a strong working knowledge of the marketplace and its participants. Career highlights include prior employment with KPMG and Synapse Group (A Division of Time Inc.). John holds a bachelor's degree in Accounting from Fairfield University.

Steven Shapiro

Mr. Shapiro founded Q Capital Strategies, LLC ("Q Capital") in 2004 and has served as its President and CEO since that time. Since 2013, Mr. Shapiro has also served as President and CEO of Life Settlement Solutions LLC ("LSS"). Both Q Capital and LSS are full service life settlement companies, offering policy origination, servicing, independent policy valuation analysis, and consulting and advisory services. Previously, Mr. Shapiro was the President of MARK Partners LLC, a merchant banking boutique he founded in 2001. Mr. Shapiro has extensive experience in strategic consulting, investment banking advisory services, and private equity investing. Mr. Shapiro has held positions with several private equity and investment banking partnerships, including The Blackstone Group, LP and Centre Partners Management LLC. Mr. Shapiro holds a B.A. degree in economics from the University of Pennsylvania and an M.B.A. in finance and entrepreneurial management from The Wharton School of the University of Pennsylvania.

Michael Fasano

Michael Fasano is founder and President of Fasano Associates, a leading underwriting consulting firm serving the life, annuity and life settlement markets.

Before starting Fasano Associates, Mr. Fasano served as President of Trans-General Life Insurance Company; and before that, he worked as an Investment Advisor for a large internally managed pension fund. Mr. Fasano started his career at the White House Office of Management and Budget.

Mr. Fasano received his B.A. from Northwestern University and his M.A. from the University of Wisconsin, Madison. He currently serves on the Board of Visitors for Northwestern University's College of Arts & Sciences. He also serves as a Board member of the Institutional Longevity Markets Association (ILMA) and the European Life Settlement Association (ELSA). He is a frequent industry speaker and has published articles in Best's Review, Pensions and Investments, and the National Underwriter.