



ALFA International
THE GLOBAL LEGAL NETWORK



Reaching the *Gold* Standard

Collaboration and Creativity in a Competitive Environment

2024 INTERNATIONAL CLIENT SEMINAR

FEBRUARY 29-MARCH 3, 2024 | EL CONQUISTADOR RESORT | FAJARDO, PUERTO RICO

www.ALFAInternational.com

**2024 International Client Seminar
Committee Members**



Cate Jackson
Chair, 2024 International Client Seminar
GENTRY LOCKE
Lynchburg, Virginia



Joseph Fortner
*Vice Chair & Presentation Consultant,
2024 International Client Seminar*
HALLORAN SAGE
Hartford, Connecticut



Schaun Henry
*Chair Emeritus, 2024 International
Client Seminar*
MCNEES WALLACE & NURICK LLC
Harrisburg, Pennsylvania



Chris Page
*Double Chair Emeritus, 2024
International Client Seminar*
YOUNG MOORE AND HENDERSON, P.A.
Raleigh, North Carolina



Eddy Hayes
Chair, ALFA International Board of Directors
LEAKE & ANDERSSON, L.L.P.
New Orleans, Louisiana



Grace Garcia
*Vice Chair, ALFA International
Board of Directors*
MORRISON MAHONEY LLP
Boston, Massachusetts



Byrona Maule
*Course Book Editor, 2024
International Client Seminar*
PHILLIPS MURRAH P.C.
Oklahoma City, Oklahoma



Andrew Doublerly
*Assistant Course Book Editor, 2024
International Client Seminar*
DICKINSON & GIBBONS, P.A.
Sarasota, Florida



Christin Kraemer
TIEFENBACHER
Heidelberg, Germany



Jane Kim
WRIGHT LINDSEY JENNINGS
Little Rock, Arkansas



Richard Latta
STAFFORD ROSENBAUM LLP
Madison, Wisconsin



Tim Peeples
DANIEL COKER
Oxford, Mississippi



Marta Rodrigues
L.O. BAPTISTA ADVOGADOS
São Paulo, Brazil



Allen Sydnor
HUIE, FERNAMBUCQ & STEWART, LLP
Birmingham, Alabama



Brendan Taylor
MILLS OAKLEY
Perth, Australia

Reaching the *Gold Standard*

Collaboration and Creativity in a Competitive Environment

2024 INTERNATIONAL CLIENT SEMINAR

FEBRUARY 29-MARCH 3, 2024 | EL CONQUISTADOR RESORT | FAJARDO, PUERTO RICO

In 2024, the world will celebrate the summer Olympic games in Paris. The Olympic creed states, in part, “the important thing in life is not the triumph, but the fight, the essential thing is not to have won, but to have fought well.” Like the athletes training for elite competition, we as attorneys seek to embody that same spirit of pride and dedication to our craft—to know that we have fought well and risen to the occasion in the face of adversity and competition. We can imagine our work as training and preparation for the ultimate goal of achieving the best result for our clients and companies, whether through groundbreaking use of technology, selecting the best “teammates” for a case or project, or implementing innovative strategies to work creatively in the face of adversity.

In 2024, the International Client Seminar will convene in beautiful Puerto Rico to explore the many ways in which we can combine our innate sense of competition with collaboration and ingenuity to serve our clients, companies, and one another through the practice of law. No matter your background, geographic area or area of practice, prepare to be inspired and challenged. In the words of gold medalist Wilma Rudolph, “the potential for greatness lives within each of us.”



Cate Jackson
Chair, 2024 International Client Seminar
GENTRY LOCKE
Lynchburg, Virginia



WELCOME TO PUERTO RICO & THE EL CONQUISTADOR

Puerto Rico, known as the “Island of Enchantment,” offers a unique blend of rich history, vibrant culture and breathtaking natural beauty. With its warm, tropical climate, pristine beaches and lush rainforests, this U.S. territory provides a captivating setting for the 2024 International Client Seminar. Whether you’re an adventure seeker, a nature enthusiast or simply looking to unwind in paradise, Puerto Rico has something to offer everyone!

Nestled on the northeastern coast of Puerto Rico, the El Conquistador Resort is a quintessential destination on the island. Perched on a cliff overlooking the azure Caribbean Sea, the resort offers breathtaking panoramic views and boasts a private island, Palomino Island, exclusively accessible to guests. Join us at this idyllic retreat, where the beauty of Puerto Rico and the comforts of the El Conquistador Resort combine to create lasting memories for attendees of the 2024 International Client Seminar.

WHAT IS ALFA INTERNATIONAL?

ALFA International is the premier network of independent law firms. Founded in 1980, ALFA International was the first and continues to be one of the largest and strongest legal networks. We have 140 member firms throughout the world. Our 80 U.S. firms represent 95 of the 100 largest metropolitan areas. Our 60 international firms are located throughout Europe, Asia, Australia/New Zealand, Africa, Canada, Mexico and South America. ALFA International’s mission is to provide high quality, cost efficient legal services wherever our clients need them. The ALFA International model enables our members to use their local expertise to deliver highly effective legal solutions, often drawing upon the collective wisdom and experience of other member firms. ALFA International clients benefit from a geographically comprehensive network of exceptional law firms and accomplished trial and business counsel. Our member firms meet high standards to be part of the ALFA International network and are well respected by their peers in the legal and business community.

12:00 p.m. – 5:00 p.m.
FACULTY REHEARSAL

Atlantic Salon 2-3

12:00 p.m. – 6:00 p.m.
REGISTRATION & HOSPITALITY SUITE

Atlantic Foyer

Take a moment to relax from traveling and have a drink and a snack with other arriving attendees prior to the start of the program.

Suggested Attire: Come as you are.

5:00 p.m. – 5:30 p.m.
ALL ALFA INTERNATIONAL ATTORNEY MEETING

Atlantic Salon 2-3

All ALFA International attorneys are required to attend.

6:30 p.m. – 9:30 p.m.

Lighting the Olympic Torch

WELCOME RECEPTION, BUFFET DINNER & REGISTRATION

Atlantic Terrace

After a long day of travel, spend the evening in an atmosphere that reflects the beauty of Puerto Rico and the Olympic spirit. On the final leg of its journey, the Olympic Torch will guide attendees from the opening reception to dinner before being placed at the Hospitality Suite where it will remain for the duration of the seminar.

Suggested Attire: Come as you are.

9:30 p.m. – 12:00 a.m.

After-Hours Hospitality Suite

Atlantic Foyer

Feel like a night cap or a snack before turning in for the evening? Join attendees at the after-hours hospitality suite to finish catching up at the end of day one.

Hospitality Suite Liaison:

Chris Page
YOUNG MOORE AND HENDERSON, P.A.
Raleigh, North Carolina

5:30 p.m. – 6:30 p.m.

Women's Initiative Reception

Hightide Rooftop Bar Terrace

Please join your female colleagues on the beautiful Hightide Rooftop Bar Terrace for some special networking time before the official welcome reception begins.

Melanie Cheairs
Women's Initiative Liaison
MAYER LLP
Houston, Texas

FRIDAY, MARCH 1, 2024

7:00 a.m. – 9:00 a.m.
BREAKFAST BUFFET

Atlantic Terrace

Attendees: 7:00 a.m. – 8:00 a.m.
Companions: 7:00 a.m. – 9:00 a.m.

7:00 a.m. – 8:00 a.m.
FIRST-TIME ATTENDEE BREAKFAST BUFFET

Atlantic Salon 1

All first-time client and attorney attendees are encouraged to attend this breakfast to connect and get their questions answered about the days to come.

8:00 a.m. – 12:15 p.m.
PROGRAM SESSIONS

Atlantic Salon 2-3, Palominito, Icacó, Vieques & Culebra Breakout Rooms

8:00 a.m. – 8:20 a.m.

Opening Ceremony



Eddy Hayes
Chair, ALFA International Board of Directors
LEAKE & ANDERSSON, L.L.P.
New Orleans, Louisiana



Cate Jackson
Chair, 2024 International Client Seminar
GENTRY LOCKE
Lynchburg, Virginia



Jessica Zaroski Bauer
Chief Executive Officer
ALFA INTERNATIONAL
Chicago, Illinois

8:20 a.m. – 9:20 a.m. GENERAL SESSION

Artificial Intelligence—The New Gold Standard?

While Artificial Intelligence is not a new technology, it is now mainstream and for some it signals Armageddon or doomsday scenarios. For others, it is the ultimate steroid-like elixir-offering endless opportunities to gain that winning and competitive edge. Most agree, however, that the generative AI revolution presents a myriad of legal and ethical issues for companies from boots on the ground to legal departments to the consumer. This opening session will provide an entertaining and provocative look into these issues as well as the potential current uses and misuses of this Mach-pace growing technology.



Tamara Nelson
Co-Moderator
MERRICK, HOFSTEDT & LINDSEY, P.S.
Seattle, Washington



Paul Klockenbrink
Co-Moderator
GENTRY LOCKE
Roanoke, Virginia



Katie Koehler
Legal Counsel
TRELLEBORG GROUP
Trelleborg, Sweden



Ryan McGary
General Counsel & Corporate Secretary
AAF INTERNATIONAL
Louisville, Kentucky



Daniel Rosenberg
CHARLES RUSSELL SPEECHLYS
London, United Kingdom

9:20 a.m. – 9:35 a.m.

AI ROUNDTABLE DISCUSSION

9:35 a.m. – 9:55 a.m.

BREAK

9:55 a.m. – 10:55 a.m. BREAKOUT SESSIONS - GROUP 1

BREAKOUT WINNING AI GOLD FOR IN-HOUSE LEGAL DEPARTMENTS (& AVOIDING THE AGONY OF DEFEAT)

1 This presentation is intended to provide an up-to-date focus on potential opportunities and challenges arising from in-house counsel's use of AI in their departments (i.e., contract review, drafting and other means of leverage lean in-house departments) and the challenges AI will present as their internal client uses AI in day-to-day business operations, including the disparate regulation by different countries. This presentation will tailor its discussion toward the use of AI in in-house legal departments for transactional projects and intellectual property as well as the applicable updates the legal landscape. Several topics of discussion will include IP creation and ownership (AI generated pictures, stories, essays, publications, etc.) as well as practical issues such as billing for AI-created/assisted legal work, the marketing department's use of AI, HR's use of AI for seeking new employees and employee engagement, implications for D&O liability coverages, etc. as well as the potential benefits and risks of incorporating AI into in-house transactional projects.



Cody Cooper
Moderator
PHILLIPS MURRAH P.C.
Oklahoma City, Oklahoma



Elliot Miller
SVP, General Counsel
WOWZA
Lakewood, Colorado



Christin Krämer
TIEFENBACHER
Heidelberg, Germany



John Osgathorpe
TAYLOR, DAY,
GRIMM & BOYD
Jacksonville, Florida

BREAKOUT EXERCISE AND STRENGTHEN YOUR CULTURAL COMPETENCE TO IMPROVE COLLABORATIVE PERFORMANCE AND REDUCE RISK

2 Globalization, mobility and interconnectivity create new opportunities for growth with customers in new markets. Cultural competence helps us understand and communicate with people from other cultures, improve the chance of successful business interactions, increase efficiency and productivity and reduce risk. This session will discuss why cultural competence is important and present strategies to mindfully improve your skills in this area.



Rob Smith
Moderator
MAYER LLP
Houston, Texas



April Berman
SVP, Deputy General Counsel
ASURION
Nashville, Tennessee



Sergio Leeman
Director Legal Services
ALDO GROUP
INTERNATIONAL AG
Baar, Switzerland



Gero Schneider
TIEFENBACHER
Heidelberg, Germany

BREAKOUT COOL RUNNINGS—THE POWER OF PERSERVERANCE

3 Bobsledding may not be the common sport of Jamaica, yet, more than thirty years ago, in 1988 the Jamaican bobsled team competed for the first time in the Winter Olympics. They overcame individual and group obstacles in order to train in a hot, island environment, where no one thought they could successfully compete. Even worse, one week before the Calgary games, one of the team members got injured and had to be replaced. Despite these challenges, the Jamaican team competed, and did so at a high level. Similarly, lawyers and companies often have to individually and within their group adapt, adjust and think outside the box to get over unexpected hurdles that are faced within the work place. This panel will discuss tools to effectively navigate work group challenges to motivate attorneys/employees to be creative and preserve, including how to put together teams that are the most competitive to overcome challenges.



Grace Garcia
Moderator
MORRISON MAHONEY LLP
Boston, Massachusetts



Quo Vadis Cobb
Vice President
JACOBS
Dallas, Texas



Melanie Chairs
MAYER LLP
Houston, Texas



Nicole Brunson
Head of Litigation & Disputes
ARRIVAL
Huntersville, North Carolina



Caren Reis
Associate Counsel & Assistant Secretary
SKYLINE CHAMPION CORPORATION
Troy, Michigan



Mackenzie Monaco
MONACO COOPER
LAMME & CARR, PLLC
Albany, New York

BREAKOUT SKELETONS IN THE CLOSET: NAVIGATING PRIVACY ISSUES FOR BETTER DATA PROTECTION AND BRAND SUCCESS IN THE FUTURE

4 Certificants and skilled veterans in the data privacy and cybersecurity space will walk attendees through a data breach case study from start to finish, including identifying and reporting the security event, responding to the event, business continuation and determination of notice requirements from both a legal and PR perspective. Attendees will gain valuable insight into the processes and collaboration involved during a security event and how to respond in a timely and effective manner. Panel members will provide guidance and best practice tips during the case study exercise that is adaptable for progressing data privacy and security regulations and technology. The panel will conclude the case study with a lessons-learned section and how to be better prepared for future security threats that are constantly evolving in our industries.



Nick Brauns
Moderator
HIGGS FLETCHER
& MACK, LLP
San Diego, California



Mindy McPheeters
Senior Vice President, General
Counsel & Corporate Secretary
SPIRIT AEROSYSTEMS
Wichita, Kansas



Winnie Yeung
Legal Director
LIME
San Francisco, California



Krystle Dalke
HINKLE LAW FIRM LLC
Wichita, Kansas

10:55 a.m. – 11:15 a.m.
BREAK



11:15 a.m. – 12:15 p.m. BREAKOUT SESSIONS - GROUP 2

BREAKOUT 1 THE 5 OLYMPIC RINGS OF CRISIS COMMUNICATION: COMMITMENT, COMMUNICATION, CONCENTRATION, CONTROL, & CONFIDENCE. HOW TO ENSURE YOUR COMPANY MEDALS GOLD

1

A well-prepared crisis management plan can help businesses manage any negative situation in a way that fosters trust and credibility with employees, customers and the general public. Similar to how Olympic team athletes must be prepared to face physical injuries, psychological pressures, or external factors, this session will focus on the importance of establishing a corporate team environment that is ready to manage in the face of catastrophes. To medal Gold, companies must effectively assess, prepare, train, respond, and perform in times of crisis.



Kelly Hoffman
Moderator
NORMAN HANSON
& DETROY, LLC
Portland, Maine



Dave Kight
Associate General Counsel –
Employment & Reg. Affairs
GARMIN
Olathe, Kansas



Ron Peppe
EVP of Shared Services, Legal
and Human Resources
CANAM STEEL
CORPORATION
Point of Rocks, Maryland



Christen Blackburn
LEWISTHOMASON
Nashville, Tennessee

BREAKOUT 2 SMOKEY JOE'S "AGONY OF DEFEAT" BLUES SALOON: WHERE OLYMPIC-QUALITY LAWYERS COME TO SING THE BLUES

2

In the only decent watering hole in Cate's Olympic Village 2024, there is a place to go when you are experiencing the agony of defeat. Defeat can mean a lot of things. Your case has gone south because of bad facts, a bad judge or bad lawyering. Your law practice or legal department has gone south because somehow you've lost control of managing it well. Your personal life has gone south because you have forgotten how to balance work and family. It's time to sing the blues. In a recreation of a classic Chicago blues club with real guitars and bluesy jams, this breakout session will cover real-life "blues beat-down's," and offer practical advice and strategies on how to dig yourself, with the help of friends, out of the hole you're in.



Chris Page
Moderator
YOUNG MOORE AND HENDERSON, P.A.
Raleigh, North Carolina



Erik Lindseth
Senior Vice President and General Counsel
LIFE TIME, INC.
Chanhassen, Minnesota



D. Jay Davis
CLEMMENT RIVERS, LLP
Charleston, South Carolina



Tamara Conn
General Counsel
O'REILLY AUTO PARTS
Springfield, Missouri



Carlos Vera
JOHNSON & BELL, LTD.
Crown Point, Indiana

BREAKOUT 3 BEYOND COURTROOMS AND CLOSINGS: AN EXCHANGE OF IDEAS ON CORPORATE CITIZENSHIP AND GIVING

3

Corporations contributing to the common good have long played a role in our society as individuals and corporations alike seek to give back in order to further philanthropic goals, benefit the community and in the case of businesses, build customer goodwill. More and more, terms like "corporate social responsibility," "ESG," "international philanthropy" and "public benefit corporations" are being used. But what do all these terms really mean? There are multiple alternatives available to those who seek to give, and selecting an appropriate giving vehicle requires a clear philanthropic objective as well as navigating the relevant tax, legal and governance requirements. This panel will discuss these timely topics and provide practical tips for those seeking to establish structures for giving. In addition, for businesses involved in international long-term giving programs, our panel will discuss relevant portions of the new U.S Corporate Transparency Act (CTA), and how the CTA impacts international giving programs or businesses with operations or investments in the United States



Rich Latta
Moderator
STAFFORD ROSENBAUM LLP
Madison, Wisconsin



Jorge Lopez
Senior Associate
General Counsel
JOHN D. & CATHERINE T.
MACARTHUR FOUNDATION
Chicago, Illinois



Mary Garris
STOLL KEENON OGDEN PLLC
Louisville, Kentucky



Alyssa Razook Wan
FOWLER WHITE
BURNETT P.A.
Miami, Florida

BREAKOUT 4 SELLER DUE DILIGENCE—OLYMPIC SUCCESS OR EPIC FAIL

4

For sellers wanting to sell their company, a positive outcome is not a foregone conclusion. Effective preparation for a sale process can dramatically enhance the chance of a successful sale. On the other hand, ineffective seller preparation can result in added stress, time and cost, can reduce the sale price achieved and may even discourage potential buyers from bidding at all. Following last year's session on "What's New in Due Diligence", this presentation will demonstrate why effective seller due diligence is absolutely worth the time, effort and cost involved and will give real practical tips on seller due diligence do's and don'ts. The panel will present from a background of many transactions on both the sell-side and the buy-side and from seeing what can add value in a deal and what can go wrong.



Brett Cowell
Moderator
COWELL CLARKE
Adelaide, Australia



Phil Maynard
Chief Legal Officer
TEALIUM INC.
San Diego, California



Jordan Rattray
General Counsel
GEOSYNTEC
CONSULTANTS, INC
Detroit, Michigan



Juan Pablo Triana
TRIANA, URIBE & MICHELSEN
Bogotá, Colombia

12:15 p.m. – 1:30 p.m.

LUNCH BUFFET

Atlantic Terrace

1:30 p.m. – 5:30 p.m.

OPTIONAL ACTIVITIES

See Social Brochure for more information. Prior registration is required.

1:30 p.m. – 6:30 p.m.

HOSPITALITY SUITE

Atlantic Foyer

If you decide not to participate in an optional afternoon activity, feel free to relax in the hospitality suite or grab a snack and a drink mid-afternoon. It's also a good gathering place for those attendees out for the afternoon to regale their friends with a lively review of the afternoon's explorations once returning to the resort.

6:30 p.m. – 10:00 p.m.

A Puerto Rican Beach Night

Cocktail Reception & Buffet Dinner

Palomino Island

Tonight's dinner will take attendees to the beautiful Palomino Island where we will experience some of the culture of Puerto Rico. Board a private boat at the El Conquistador Marina for a 15-minute ferry to the island where you will be greeted by traditional Pleneros, Vejigantes, Cabezudos (Big Heads) and "Jibarita" Dancers. Following a 90-minute cocktail reception, make your way onto the sand for a buffet dinner under the stars while enjoying beautiful melodies from Cuba and Puerto Rico.

Boats will depart the El Conquistador Marina at 6:00 p.m., 6:20 p.m., 6:40 p.m. and 7:00 p.m. Boats will begin return trips from the beach to the marina at 8:45 p.m.

Suggested Attire: Beach-inspired attire. Dinner this evening will take place on the sand, flat shoes are strongly encouraged. As this is an outdoor venue, light layers are also recommended.

10:00 p.m. – 12:00 a.m.

After-Hours Hospitality Suite

Atlantic Foyer

Those who aren't quite ready for the party to end are welcome to join their colleagues after-hours for some special late-night activities!

Hospitality Suite Liaisons:



Byrona Maule
PHILLIPS
MURRAH P.C.
Oklahoma City,
Oklahoma



Allen Sydnor
HUJE,
FERNAMBUCQ
& STEWART, LLP
Birmingham,
Alabama

SATURDAY, MARCH 2, 2024

7:30 a.m. – 8:30 a.m.

CLIENT ROUNDTABLE BREAKFAST BUFFET

Atlantic Salon 1

We encourage all attending clients to make time to attend this special client roundtable where you can discuss pressing issues with your fellow client colleagues without ALFA International attorneys present.

7:30 a.m. – 9:30 a.m.

BREAKFAST BUFFET

Atlantic Terrace

Attendees: 7:30 a.m. – 8:30 a.m.
Companions: 7:30 a.m. – 9:30 a.m.

8:30 a.m. – 12:15 p.m.

PROGRAM SESSIONS

Atlantic Terrace, Atlantic Salon 2-3, Palominito, Icacó, Vieques, Culebra, Siete Mares, Ceiba, Las Croabas & Palmas Breakout Rooms

8:30 a.m. – 9:15 a.m. ROUNDTABLE SESSIONS – ROUND 1

Attendees choose one option from the list below.

ROUNDTABLE 1 IF IT DOESN'T WALK LIKE A DUCK OR QUACK LIKE A DUCK, CAN IT STILL BE A DUCK? WORKING COLLABORATIVELY TO FIND RESOLUTIONS TO DEI ISSUES THAT DON'T "CHECK THE BOX"

Have you ever stuck your foot in your mouth? Have you ever been called out for offending someone? Have you ever thought to yourself, "why do people have to be so sensitive?" Are you beginning to feel that "PC" words and behaviors rule the day more than brutal honesty? Have you ever encountered or heard about an HR situation or issue that was atypical or that you felt inept to address? Have you felt uncomfortable or even embarrassed to seek guidance or input from others?

In this unique and interactive session, we invite you to explore HR issues that may not neatly fit into traditional categories and tackle microaggressions and other exclusionary behaviors in the workplace. We will offer a safe space to seek guidance and collaborate on complex workplace matters. We'll present and discuss pre-submitted questions and real-life scenarios (solicited from ICS attendees in advance and presented anonymously), which will serve as a springboard for our panel and audience to reflect, engage and develop practical and thoughtful ways to navigate complex HR situations and other interpersonal interactions within diverse workforces.

Dina Cox
Co-Moderator
LEWIS WAGNER, LLP
Indianapolis, Indiana

Monica Garcia
Co-Moderator
BUTT THORNTON
& BAEHR PC
Albuquerque, New Mexico

Jasmine Kingsley
Chief People and Legal Officer
HUDL
Lincoln, Nebraska

Sonia Valdes
Vice President
MEDMARC INSURANCE
COMPANY
Chantilly, Virginia

ROUNDTABLE 2 THE LASSO WAY: WE WANT A TIE!

Working together to resolve complex litigation matters under a reservation of rights can make the insured and the insurance company feel more like adversaries than teammates. Covered versus non-covered claims, additional insured issues and first and third-party claims all influence the game plans. Add the risk of excess exposure to pitch and you have potential conflicts that don't even involve your opponent. The duty of good faith and the duty to cooperate are not just buzz words but real-life obligations. This panel will explore the challenges and successful approaches to achieving the best outcome (sometimes that's a tie!) in these scenarios.

Richard Hennessey
Co-Moderator
MORRISON MAHONEY LLP
Boston, Massachusetts

Kathy Terry
Co-Moderator
PHILLIPS MURRAH P.C.
Oklahoma City, Oklahoma

Heather Magnuson
Deputy GC
SHAW INDUSTRIES
GROUP, INC.
Dalton, Georgia

David Vanalek
Chief Legal and
Compliance Officer
RICHMOND NATIONAL
INSURANCE COMPANY
Richmond, Virginia

8:30 a.m. – 9:15 a.m. **ROUNDTABLE SESSIONS – ROUND 1**
ROUNDTABLE **KEEPING THE GOLD: MAINTAINING A SUCCESSFUL BUSINESS WHEN TRANSITIONING FROM THE BOOMER TO THE NET GENERATION AND GENERATION Z**
3

The workforce had been changing even before the pandemic, with workers becoming older and not wanting to retire, and Millennials in the workforce presenting challenges for employers. With the pandemic, employers saw an increasing number of employees retire, sometimes at their desks, and they struggled, and continue to struggle, to find enough workers to meet their needs. This roundtable will discuss what clients see for the future, the need for succession planning in order to maintain a business' high standards and retain institutional knowledge and ways to address the issues employers face with the aging and diminishing workforce, as well as the issues faced with those who don't want to retire and those who retire at their desks.



Joel Hlavaty
Moderator
 FRANTZ WARD LLP
 Cleveland, Ohio



Rob Bertram
Chief Legal Officer
 CAVA GROUP
 Washington, D.C.



Ignacio López-Balcells
 BUFETE BARRILERO
 Barcelona, Spain

ROUNDTABLE **EXPERTLY WORKING WITH EXPERT WITNESSES: HOW TO COLLABORATE TO WIN THE CASE**
4

When the key to the case depends upon quality expert testimony, how do you make sure you choose the right professional for the job? And then, once selected, how do you collaborate successfully to make sure that expert opinions are clearly presented to the trier of fact. Whether your expert is a medical professional, a real estate appraiser, a mechanical engineer or a wiz in some other field, you need to make sure that their technical expertise translates in a way that makes it possible to win the case. This can only be achieved through effective communication and collaboration. The roundtable will discuss how to work with your expert from the beginning of the case to the end to achieve success.



Kandice Hull
Moderator
 MCNEES WALLACE & NURICK LLC
 Harrisburg, Pennsylvania



Kevin Flaherty
Partner
 MDD FORENSIC ACCOUNTANTS
 Boston, Massachusetts



Jen Pedevillano
 HALLORAN SAGE
 New Haven, Connecticut

ROUNDTABLE **IMMIGRATION AND THE MODERN WORKFORCE—A MATCH NOT QUITE MADE IN MADE IN HEAVEN**
5

With an aging workforce and a labor force participation that has declined since the 1990s, it is clear employee shortages will only get worse over time in agriculture, and also in many other sectors of the economy. In 2022, the U.S. had almost twice as many job openings as unemployed workers. The shortage of workers results in higher wages and less production of agricultural and other goods, ultimately leading to higher consumer prices. Some say the easy fix is turning to immigrants to fix the problem. In this roundtable we will discuss the potential pitfalls and positives of using immigration to supplement the labor force. Come with us as we explore the challenges and rewards facing employers who are seeking to bolster their workforce.



Schaun Henry
Moderator
 MCNEES WALLACE & NURICK LLC
 Harrisburg, Pennsylvania



Eva Seif
Assistant General Counsel
 CAVA
 Washington, D.C.



Kelvin Tanner
 CHARLES RUSSELL SPEECHLYS
 London, United Kingdom

ROUNDTABLE **TAKEAWAYS FROM RECENT TRADE SECRET TRIALS**
6

Cases almost always settle and often settle early, depriving counsel of the opportunity to apply late-litigation lessons learned to the next case. In this roundtable session, we present those lessons learned from one recent trade secrets arbitration, and another complex, multi-party trade secrets case that settled two days before trial. Learn what issues become critically important when considering how to present your trade secrets case to the jury or the arbitrator, so you can apply that to your pleading, discovery, deposition and motion strategies.



Yvette Davis
Moderator
 HAIGHT BROWN & BONESTEEL LLP
 Los Angeles, California



Justin McCarthy
General Counsel
 HOYA VISION CARE
 Plano, Texas

ROUNDTABLE **IT SEEMED LIKE A GOOD IDEA AT THE TIME: HOW TO MAKE EFFECTIVE DECISIONS UNDER CONFLICT**
7

Effective and critical decision-making is essential in our work, but can still be very difficult for attorneys and clients involved in conflict. We tend to believe our own reactions are controllable, and that others will act rationally. However, this is not the case. Research has proven that we are not hardwired for decision-making. In this session, you will learn the causes of ineffective decision-making for attorneys and clients in conflict, methods to avoid decision-making pitfalls when in conflict and essential skills to improve your own decision-making and problem-solving, as well as how to assist others, for better outcomes.



Stephen Kelson
Moderator
 CHRISTENSEN & JENSEN, P.C.
 Salt Lake City, Utah



Jim Dickson
Senior Manager Claims
 FLIX BUS
 Dallas, Texas

8:30 a.m. – 9:15 a.m. **ROUNDTABLE SESSIONS – ROUND 1**

ROUNDTABLE 8 FASTER, HIGHER? AND STRONGER—EVOLVING GLOBAL MARIJUANA LAWS AND THEIR IMPACT ON EMPLOYERS

Since 1924, the Olympic motto has been: Faster, Higher, Stronger. Employers also strive to work faster, achieve stronger results and bring their company to new heights. But is the rapid trend towards legalization of marijuana resulting in a compromised workforce and exposing companies to significant liability?

Our roundtable will engage in discussion aimed at identifying keys to successfully navigating marijuana legalization and changing regulatory and legal guidance, such as:

- Drawing the line between using, possessing, and being impaired
- Grappling with medical inquiries, documentation requests, and examinations
- Training supervisors to consistently implement policies
- Understanding high risk areas and working to mitigate exposure while trying to retain and recruit talent



Courtney Nichols
Moderator
PLUNKETT COONEY
Detroit, Michigan



Jennifer Lankford
Associate General Counsel
CRACKER BARREL OLD COUNTRY STORE, INC.
Lebanon, Tennessee



Mickey Clark
Senior Legal Counsel
O'REILLY AUTO PARTS
Springfield, Missouri



Jane Kim
WRIGHT LINDSEY JENNINGS
Little Rock, Arkansas



9:15 a.m. – 9:35 a.m.

BREAK

9:35 a.m. – 10:20 a.m.
ROUNDTABLE SESSIONS – ROUND 2

Attendees choose one option from the list above.

10:20 a.m. – 10:40 a.m.

BREAK

10:40 a.m. – 10:55 a.m.

What's Happening at ALFAI Headquarters?

This session will provide an overview of many new and some improved offerings available on the ALFA International website as well as resources and opportunities available to our clients.



Jessica Zaroski Bauer
Chief Executive Officer
ALFA INTERNATIONAL
Chicago, Illinois

10:55 a.m. – 11:55 a.m.

GENERAL SESSION

Game, Set, Match: "It's Not Whether You Win or Lose ... Yes, It Is!"

In the Center Court of high-stakes litigation, trials and business negotiations, there exist written and unwritten rules, standards and ethical practices. While some believe that adherence to those rules is a pre-eminent "good" in-and-of-itself, others believe it appropriate (and necessary) to test the boundaries. The struggle to find the line between zealous advocacy and sharp practice causes a continuing ethical, professional and even moral conundrum.

Our final panel will explore where that elusive "line" is. After serving up fact-based scenarios, our teams will challenge the audience – and each other – to judge just where and when conduct may be inside the lines, or out-of-bounds. We will offer guidance for clients and counsel regarding how to effectively control the trial, proceeding or negotiation, without being faulted for misbehavior. We will also discuss whether and how to call out an adversary's conduct. By the end, you'll have a better idea how to manage the court and those judging it.



Joseph Fortner
Co-Moderator
HALLORAN SAGE
Hartford, Connecticut



Rita Castro
Director, Claims & Risk Management Counsel
UNITED RENTALS, INC.
Modesto, California



Jaime Skinner
General Counsel
BRENTTAG NORTH AMERICA
Reading, Pennsylvania



Tim Peeples
Co-Moderator
DANIEL COKER
Oxford, Mississippi



Ben Gross
Chief People Officer and GC
BACKCOUNTRY
Park City, Utah



Christine Mast
HAWKINS PARNELL & YOUNG, LLP
Atlanta, Georgia

11:55 a.m. – 12:15 p.m.

Closing Ceremony



Cate Jackson
Chair, 2024 International
Client Seminar
GENTRY LOCKE
Lynchburg, Virginia

12:15 p.m. – 1:30 p.m.

LUNCH BUFFET

Atlantic Terrace

12:15 p.m. – 1:30 p.m.

CORPORATE TRANSACTIONS LUNCH BUFFET

Atlantic Salon 1

Attendees interested in connecting with others who practice in the Corporate Transactions space are welcome to attend this informal lunch.

1:30 p.m. – 5:30 p.m.

OPTIONAL ACTIVITIES

See Social Brochure for more information. Prior registration is required.

1:30 p.m. – 7:00 p.m.

HOSPITALITY SUITE

Atlantic Foyer

The seminar is nearly complete, and an afternoon of relaxation awaits you in the hospitality suite.



5:30 p.m. – 7:00 p.m.

Meet Our Internationals Rum Tasting

Mirador Terrace

A unique opportunity to meet international (non-U.S.) attorneys and learn about Puerto Rican rum. If you are a client who has needs outside of the United States, we encourage you to attend this event!

7:00 p.m. – 10:00 p.m.

The Greek Olympics

Medal Ceremony

COCKTAIL RECEPTION & BUFFET DINNER

South Pool and Trellises

Our closing dinner will take attendees back to the Olympics' conception where we will turn the Trellises into a Greek Amphitheater complete with the gifts of Demeter and Dionysus for all to enjoy. A medal ceremony will crown the 2024 ICS "victors" and the torch will be extinguished as we bid each other farewell. Until we meet again!

Suggested Attire: We encourage you to dress in chic, white attire to fit the theme of our dinner—think elevated toga! The Trellises is an outdoor space, light layers are recommended.

10:00 p.m. – 12:00 a.m.

After-Hours Hospitality Suite

Atlantic Foyer

The seminar has come to a close and hopefully you've made some new friends and re-connected with old ones. Say your final good-byes in the after-hours suite complete with karaoke!



Hospitality Suite Liaisons:



Joseph Fortner
HALLORAN SAGE
Hartford, Connecticut



Tim Peeples
DANIEL COKER
Oxford, Mississippi



FACULTY BIOS

JESSICA ZAROSKI BAUER joined ALFA International (ALFAI) in 2004 as a Coordinator of Events & Member Services. She then worked for several years as a Marketing Manager, Chief Events Officer and Chief Operating Officer. After 17 years with the association, she accepted her current role as Chief Executive Officer. In this position she is the strategic thought leader of the organization, working closely with the Board of Directors and the various ALFAI committees. She manages headquarters staff and maintains constant communication with association members. Jessica oversees the member recruitment, development and retention programs as well as the marketing and business development initiatives for the organization. Prior to joining ALFA International, she worked in the marketing department of the Chicago-based law firm of Gardner, Carton & Douglas, LLP (now Faegre Drinker Biddle & Reath). She is a graduate of the University of Iowa Tippie College of Business (Go Hawkeyes!) and is an avid college football fan. In her spare time Jessica can be found enjoying family time with her husband Harry and her two young

daughters, Greta and Vivian. She also enjoys swimming in Lake Michigan, playing beach volleyball and watching Oscar nominated movies.

APRIL BERMAN is Senior Vice President and Deputy General Counsel at Asurion where she is responsible for developing and executing legal strategy across multiple practice areas and countries. In addition to oversight of legal matters for Asurion throughout the Americas, April's areas of focus include Asurion's enterprise compliance program, litigation and risk management, intellectual property, and support of global supply chain management. Prior to joining Asurion in 2005, April was in private practice with Baker, Donelson, Bearman, Caldwell & Berkowitz, PC. April received her JD from the University of Tennessee College of Law and holds both a BA in English and a BS in Political Science from the University of Tennessee, Chattanooga. April is a Fellow of the Tennessee Bar Foundation, the Tennessee Bar Association—Young Lawyers Division, and the Nashville Bar Foundation and has

been recognized as NBJ Best of the Bar—Corporate Counsel annually since 2018. She currently serves on the boards of Teach for America—Nashville and Chattanooga, ACC Tennessee, and Compassion Forward.

ROB BERTRAM is Chief Legal Officer at The Cava Group, Inc. In this capacity, he is responsible for developing and leading legal strategy to promote and protect the interests of Cava's multi-channel Mediterranean culinary platform. Previously, he was General Counsel for Ollie's Bargain Outlet, Inc. ("Ollie's"). In that capacity, he was responsible for overseeing the diverse range of legal, and many business affairs involving the company. Prior to joining Ollie's, Rob was an attorney in the corporate department of McNees, Wallace & Nurick, LLC, in Harrisburg, PA, where he represented both growth and well established companies. Rob attended the Pennsylvania State University ("Penn State"), attaining a degree in economics, and received his JD from The Dickinson School of Law. He speaks frequently on both contracting, corporate governance, and store operation issues. Rob mentors undergraduate students at Penn State.

CHRISTEN BLACKBURN is shareholder at the Nashville, Tennessee ALFA International firm of Lewis Thomason. Christen's practice focuses on defending manufacturers and retailers of consumer goods, food products, automotive and construction equipment, against complex and high exposure personal injury claims. In 2021, Christen was named as one of Nashville's 40 Under 40 by the Nashville Business Journal and as Best Lawyers' 2021 and 2022 "Lawyer of the Year" for Litigation/Insurance Law in Nashville. Christen is active in the Nashville bar, currently serving on the Board of Directors of the Nashville Bar Association and as Past-President of LAW, Nashville's women's bar association. Christen is active in ALFA International where she serves in the leadership of the Product Liability & Complex Torts and Hospitality & Retail Practice Groups. She is also a past Chair of the Women's Initiative Practice Group.

NICHOLAS BRAUNS is a partner with Higgs, Fletcher & Mack, LLP, the ALFA International member firm in San Diego, California. He has a successful practice focused on litigating complex commercial disputes and assisting with the investigation and defense of industrial accidents, personal injuries and other catastrophic losses for various companies in the transportation industry (trucking, auto and rideshare entities).

NICOLE M. BRUNSON is Head of Litigation & Disputes at ARRIVAL. Nicole practices general litigation, product liability, corporate matters and commercial disputes. She focuses on global cost avoidance and risk mitigation through business engagement. Nicole is a 2006 graduate of Indiana University School of Law- Bloomington (n/k/a/ Maurer School of Law) and a 1998 graduate of Xavier University of Louisiana, where she received a bachelor's degree in Biochemistry. Nicole also obtained an MBA in Marketing and Management from Christian Brothers University in 2002. Before joining Arrival in 2021, Nicole served as Associate General Counsel, Commercial Litigation Americas for Trane Technologies and worked as an associate with Swanson Martin & Bell, LLP, a boutique litigation firm in Chicago, Illinois.

RITA M. CASTRO is employed by United Rentals, Inc., the largest rental company in the world with an integrated network of approximately 1,500 locations in the United States, Canada, Europe, Australia and New Zealand. She acts as the Company's Associate General Counsel & Director (Claims & Risk Management). She is based in Modesto, California, and oversees the handling of the Company's auto, general liability, property and workers' compensation claims. After graduating from U.C.L.A. School of Law in 1993, Ms. Castro was in private practice where she gained substantial expertise in the handling of construction coverage disputes, construction defect litigation and general business matters.

MELANIE CHEAIRS is a partner with Mayer, LLP, the ALFA International member firm in Houston, Texas. Melanie is an experienced trial lawyer, defending her clients in the Hospitality, Retail and Transportation

industries in both commercial and injury-related catastrophic loss matters. Melanie was honored as the 2016 Recipient of ALFA's Nathan Fishbach Attorney of the Year Award. Melanie was also the program chair of ALFA's 2016 International Client Seminar and previously chaired ALFA's Hospitality and Retail Practice Group. In addition, she also served as chair of ALFA's Marketing Committee.

MICKEY CLARK is a senior legal counsel for O'Reilly Auto Parts, one of the largest specialty retailers of automotive aftermarket parts, tools, supplies, equipments and accessories in the United States, serving both the do-it yourself and professional service provider markets. The Company operates more than 4,570 in 44 states. Prior to his current role at O'Reilly, Mickey was senior litigation attorney for RadioShack Corporation, having served in that position from 1990 to 2015. For the past 26 years, Mickey has practiced in the area of employment/labor law providing legal advice and /or managing litigation in every state in the U.S., as well as Puerto Rico and USVI. Mickey received his B.S. in Business Administration from the University of Texas at Dallas and his J.D. from Southern Methodist University. In September 2004, he co-authored an article in the National Law Journal entitled "New ADA Guidelines Will Affect Many Employers."

TAMARA CONN is Associate General Counsel and Director of Legal Services for O'Reilly Automotive, Inc. d/b/a O'Reilly Auto Parts and its affiliated entities. O'Reilly Auto Parts (ORLY) is a retailer of aftermarket automotive parts, tools, supplies, equipment, and accessories based in Springfield, Missouri. At O'Reilly, Tamara counsels Human Resources and management on labor and employment related issues including ADA, FMLA, Title VII, ADEA, wage and hour issues, severance matters, non-compete and nonsolicitation agreements, labor relations/ union avoidance, and other employment related matters; reviews and responds to complaints and charges filed with the EEOC and state agencies; coordinates with Human Resources in responding to wage claims; manages and coordinates the defense of all employment related litigation with outside counsel; manages and coordinates the defense of unfair labor practice charges filed with the NLRB; works with Human Resources and operations representatives in the negotiation of collective bargaining agreements; and works with Human Resources and other departments in developing, implementing, and updating employment policies, procedures, and practices and training materials relating to the same. In addition, Tamara provides support to the General Counsel and Vice President of Legal Services on corporate governance issues and compliance functions. Prior to joining O'Reilly, Tamara was in private practice for 13 years, most recently at Lathrop & Gage in Springfield, Missouri. Tamara received her undergraduate degree from Drury University and her J.D. from Wake Forest University School of Law. Tamara is a member of the ALFA International Client Advisory Board.

CODY COOPER is a director at the ALFA International Oklahoma City firm – Phillips Murrah PC. Cody is an experienced litigator and a licensed patent attorney who represents individuals and companies in a wide range of business litigation and intellectual property matters. His practice primarily concentrates on complex, commercial litigation in state and federal courts as well as intellectual property, including litigation and patent, trademark and copyright prosecution, and cybersecurity and privacy matters.

BRETT COWELL is a highly experienced corporate and commercial lawyer at the ALFA International member firm in Adelaide, Australia, Cowell Clarke. He has built a career on enabling people to operate at their best and his senior management of the firm has allowed him to bring real world experience to advising clients on corporate and business management. Recognized as both strategic and practical with a focus on commercial outcomes, Brett provides leadership and advice within the Corporate and Commercial Transactions teams. He advises clients particularly in the digital and technology, defence and advanced manufacturing sectors on a national and international scale. He assists clients doing business internationally, engaging especially with the USA,

UK, EU and South East Asia. Brett is passionate about new frontiers in science and technology. Brett is also a non-executive director of several companies, an author of multiple publications and a speaker at national and international forums. Brett's expertise in Corporate and Commercial Law has been recognised by The Best Lawyers Australia since 2017.

DINA M. COX is a partner with ALFA International member firm, Lewis Wagner, LLP in Indianapolis, Indiana and was the Program Chair for the 2021 International Client Seminar. Dina is a legal strategist and trial attorney who honors responsive client service as a top priority. She has served as lead counsel in numerous lawsuits and bet-the-company litigation involving multi-million-dollar claims ranging from breach of contract, false advertising, unfair competition, unfair commercial practices, consumer fraud and breach of warranty to claims of serious injury caused by products liability and professional negligence. Dina is an aggressive yet civil trial lawyer who has significant jury trial experience in state and federal courts and substantial appellate experience. Dina defends mass torts, class actions, government enforcement actions, drug and medical device cases, toxic tort and chemical exposure cases and professional liability lawsuits including legal malpractice. Dina also counsels clients during government investigations and assists professionals facing disciplinary grievances and licensing issues. Dina's mass tort and class action defense work is national in scope and has included lawsuits filed in numerous states from New York to California as well as lawsuits consolidated as part of multi-district litigation. Dina is a regular faculty member for the national institute of trial advocacy in its learn-by-doing trial advocacy courses and a frequent speaker on product and professional liability topics.

KRYSTLE DALKE is an attorney at Hinkle Law Firm LLC the ALFA International member firm in Wichita, Kansas. As a Certified Information Privacy Manager (CIPM) and Certified Information Privacy Professional (CIPP/US) focusing on United States privacy laws, Krystle helps clients tackle legal compliance issues and navigate the United States' sectoral approach to privacy while also balancing each client's business and operational needs. No two businesses are alike and Krystle appreciates the uniqueness each client brings to the equation. Krystle also performs data risk assessments and breach assessments and counsels clients faced with security events that require notice to impacted individuals. Krystle's ultimate goal for her clients is achieving a successful business model while also reaching and maintaining legal compliance.

D. JAY DAVIS, JR. is a partner with Clement Rivers, LLP, the ALFA International member firm in Charleston, SC. Jay is chair of the firm's Professional and Medical Liability practice groups and the firm's Business Litigation practice group. Jay is a Fellow in the American College of Trial Lawyers®. Jay is rated AV® Preeminent Peer Review Rated Judicial of Martindale Hubbell. Jay has also been selected as a member of Super Lawyers® in the areas of Professional Liability defense and Best Lawyers in America® for commercial litigation. Jay is also a member of the American Board of Trial Advocates ("ABOTA"). Jay grew up in Charleston and earned a Master's Degree from the University of South Carolina in 1993. Jay then graduated cum laude from the University of South Carolina School of Law, where he was also an associate editor of the South Carolina Law Review.

YVETTE DAVIS is a partner with Haight Brown & Bonesteel, LLP, the ALFA International member firm in Los Angeles, California. She is the leader of the firm's Employment & Labor Practice Group and is also a member of the firm's Construction Defect Practice Group. Her practice is concentrated in the defense of clients in a wide variety of matters, including sexual harassment, wrongful termination, discrimination, wage and hour, and claims under the Americans with Disabilities Act in both state and federal courts. Prior to rejoining Haight Brown & Bonesteel, LLP, Yvette interned in the Labor & Agencies Department of a national insurance client, working closely with Human Resources. She is a graduate of the USC School of Law and UCLA. Yvette serves on ALFA

International's Labor & Employment Steering Committee, the Women's Initiative Practice Group Steering Committee, and Board of Directors.

JIM DICKSON is the Senior Manager of Claims at FNA. He returned to fill this position after enjoying a brief retirement following 30+ years of front-line transportation claims adjusting. In his current role Jim oversees the TPA managing the day-to-day claims arising from FNA's U.S. operations which include Greyhound Lines, Inc., FlixBus, Inc., and Valley Transit. When Jim gets a break from TPAs, carriers, adjusters, and attorneys; he enjoys gardening with his best dog, Oakley and gaming with a tight-knit group of friends. He also enjoys a good bourbon.

JOSEPH G. FORTNER, JR is co-chair of the Commercial Litigation Practice Group of the Hartford, Connecticut ALFA International law firm of Halloran Sage. He is a member of the ALFAI Board of Directors, a prior chair of the Business Litigation Practice Group, and is listed in the 2024 Best Lawyers in America for Commercial Litigation, Litigation – Intellectual Property, and Trade Secrets Law. Joe is an experienced business litigator and trial lawyer in a wide range of business, intellectual property and related commercial matters in state and federal courts, ranging from trade secret claims, contract disputes, business fraud and other commercial torts, technology-related matters, trade regulation, unfair trade practices, employee termination and product-related commercial disputes. Joe represents clients in trademark and trade dress, copyright, patent, cyber defamation, domain name, licensing and other intellectual property matters. Joe uses his experience to counsel clients regarding intellectual property issues and other business relationships, prosecutes trademark matters at the Patent & Trademark Office and negotiates licenses, assignments and other intellectual property agreements. He has written and lectured on trademarks and trade dress, trade secrets, trademark dilution and e-commerce, including authoring the Connecticut portions of several ALFAI compendiums regarding trade secrets. Joe is a graduate of Duke University, and received his J.D. from Vanderbilt University School of Law. When not practicing law, he works on his guitar and mandolin skills and performs with his wife (also an attorney) in their vocal and guitar duo, "Blind Date."

GRACE V.B. GARCIA, a Partner in the Boston office of ALFA International member firm Morrison Mahoney LLP, concentrates her practice in the areas of product liability, construction law – including personal injury, construction defect and contractual - OSHA, commercial litigation, employment litigation, premises liability and Americans with Disabilities Act (ADA) cases. Grace currently serves as Vice Chair of ALFA International's Board of Directors, and is a former Chair of both ALFA International's Construction Practice Group and Women's Initiative Practice Group. Grace has an AV Preeminent Rating from Martindale Hubbell and in 2020 she was honored by Massachusetts Lawyers Weekly with its "Circle of Excellence" after being honored in 2013 as a "Top Women of Law." Grace has over 25 years of trial practice and litigation experience and has obtained successful outcomes on behalf of her clients in both state and Federal Court trials. She also has successfully argued before the Appeals Court. Beyond ALFA, she is actively involved in many professional groups, and is the Immediate Past-President of the Massachusetts Bar Association. Grace is also a past President of the Massachusetts Defense Lawyers Association and past DRI State Representative for Massachusetts. She is a routine lecturer on defending brain injuries, risk transfer and indemnity issues, best discovery practices and deposition techniques, and OSHA.

MONICA R. GARCIA is a Shareholder and Officer at the ALFA International member law firm of Butt Thornton & Baehr PC (BTB) in Albuquerque, NM, which she joined in 1998. Ms. Garcia litigates matters in federal and state courts of New Mexico in the areas of products liability, premises liability, trucking and transportation, wrongful death, consumer law, employment law and general defense liability matters. Prior to joining

BTB, she was an associate at Montgomery & Andrews PA, in Santa Fe, where she primarily practiced in the employment law arena.

BENJAMIN “BEN” GROSS is Chief People Officer and General Counsel at Backcountry.com, LLC, a global outdoor outfitter headquartered in Park City, Utah. Backcountry, a 27-year-old premium direct-to-consumer retailer, with new retail locations in Seattle, Chicago and Bozeman. Ben’s daily practice runs the gamut from corporate, intellectual property and acquisitions to organizational planning and development. Ben had previously served as General Counsel and CHRO at rue21, where he lived through the entire retail lifecycle: publicly traded, private-equity LBO, Chapter 11, and creditor-ownership post-emergence. Ben is a graduate of the University of Florida College of Law and Penn State University and is licensed to practice in four different climate zones. In his spare time, Ben runs marathons, brews fine ales and serviceable lagers, hikes daily with his three dogs, and skis weekly with his two very funny kids.

EDDY HAYES is a partner from Leake & Andersson, L.L.P., the ALFA International member firm in New Orleans, Louisiana. He focuses on both litigation and international trade and business matters. Eddy represents clients in products liability, insurance, maritime and commercial litigation matters in state and federal courts throughout the Gulf South region. Eddy also has extensive experience handling MDL, class action and mass casualty cases. In addition to his litigation practice, Eddy leads the firm’s international trade and business practice. The firm’s international trade and business practice focuses on a wide variety of international issues, including corporate and customs matters; import/export transactions; international sales of goods and services; and antidumping/countervailing duty proceedings before the Department of Commerce and International Trade Commission. Eddy also maintains an active international public policy and government relations practice, where he advises businesses and local governments on international trade policy economic development issues, including the business implications of free trade agreements.

RICHARD HENNESSEY is a partner in the Boston office of Morrison Mahoney, the ALFA International firm in Massachusetts. He represents some of the nation’s leading insurance carriers in a variety of civil litigation matters involving commercial property policies, professional and general liability policies, homeowners policies and builders risk policies. He has extensive coverage experience in a variety of matters across several lines of coverage. Richard was recently a senior claims analyst with a national third-party claims administrator concentrating in complex professional liability insurance coverage issues throughout the United States.

SCHAUN HENRY practices in the Labor & Employment Group at McNees Wallace & Nurick LLC, the ALFA International member firm in Harrisburg, Pennsylvania. He provides representation and counseling to employers on a wide range of labor and employment matters, including employment discrimination cases under Title VII of the Civil Rights Act of 1964, the Age Discrimination in Employment Act, the Americans With Disabilities Act, the Family and Medical Leave Act, the Fair Labor Standards Act and other federal, state and local issues. Schaun provides guidance for employers on unfair labor practices and other labor relations issues, as well as providing representation for employers at labor arbitrations and negotiations. He advises employers on a wide variety of personnel issues including hiring, termination and revision of policies. Schaun graduated from West Chester University and received his law degree from Dickinson School of Law. Before undertaking the practice of law, Schaun served in the Armed Forces. He is a retired Major of U.S. Army Special Forces.

JOEL HLAVATY is one of the founding partners of Frantz Ward LLP, the ALFA International member firm in Cleveland, Ohio, and is a member of its Management Committee. Joel focuses his practice on

the representation of management in all phases of labor relations and employment litigation. Joel routinely advises employers on all aspects of their relationships with employees, as well as with matters concerning litigation prevention and human resources management. In addition, he regularly defends them in federal and state courts of all jurisdictions on claims arising under the various federal and state labor and employment laws. He represents employers with respect to complaints and charges filed with the EEOC and OCRC, NLRB and SERB, and with OSHA and the DOL, as well as with health care and ERISA issues and complaints, and collective bargaining issues and strike disputes. Joel graduated from John Carroll University with honors with a double major in philosophy and psychology and a minor in mathematics. He received his law degree with honors from the University of Akron. Prior to entering private practice, he served as a law clerk to the Honorable Alice M. Batchelder on the U.S. Bankruptcy Court and U.S. District Court for the Northern District of Ohio. Joel is a frequent presenter at seminars and management training programs on a wide variety of topics. He is a member of the Ohio Bar Association and Cleveland Metropolitan Bar Association. He also is the past chair of the Labor & Employment Law Section of the Cleveland Bar Association. Since 2010, Joel has been named one of Ohio’s Super Lawyers and listed in U.S. News Best Lawyers in Cleveland.

KELLY M. HOFFMAN is a partner with the Portland, Maine ALFA International member firm of Norman, Hanson & DeTroy, LLC. Her practice focuses on litigation, including insurance defense and subrogation, employment and discrimination matters, professional liability defense, and Title IX employment and disciplinary matters. Since 2013, she has been listed in New England Super Lawyers as a Rising Star. Since 2018, she has been recognized by “Best Lawyers in America” for her work in Labor and Employment Litigation as well as Professional Malpractice Defense Law. She frequently acts as a continuing legal education presenter on both a national and state level, lecturing on employment law concerns of individuals, businesses, and counsel; evidentiary issues and challenges facing businesses and counsel during workplace investigations; and ethical dilemmas presented in litigation.

KANDICE K. HULL of ALFA International’s member firm, McNees Wallace & Nurick LLC, in Harrisburg, Pennsylvania, is Chair of her firm’s Litigation Group and leads their eminent domain practice. She is also a member of her firm’s ALFAI Committee. Her practice involves the representation of corporate clients in business litigation, with a particular focus on real estate related litigation and appellate matters. She has represented businesses in cases involving contract disputes, eminent domain, quiet title, and other property rights claims. In addition to her work in the trial courts, she handles appellate litigation matters before the Pennsylvania State and Federal appellate courts. Kandice is Associate Firm Counsel for McNees, handling ethical and conflict issues. Kandice is a 2000 graduate of the University of Virginia School of Law, and a summa cum laude graduate of Franklin and Marshall College. She has been honored as one of the Best Lawyers in America in the field of Appellate Law since 2010.

CATE JACKSON is a partner with ALFA International law firm, Gentry Locke, in Lynchburg, Virginia. Cate focuses her practice on labor and employment, professional liability and workers’ compensation. She also advises businesses in the restaurant and hospitality industry on employment matters. Cate has tried a number of cases in both state and federal trial courts and has extensive experience with motions practice. Cate regularly speaks and conducts training on a variety of employment and workers’ compensation issues in and outside of Virginia. She received her bachelor’s degree from Virginia Tech and her J.D. from Liberty University.

STEPHEN KELSON is a shareholder at the office of Christensen & Jensen, PC, in Salt Lake City, Utah, where his practice focuses on Civil Litigation and Mediation. He earned his Juris Doctorate from the J. Reuben Clark Law School, and both a Master of Dispute Resolution and Master of Law in

Dispute Resolution from the Straus Institute for Dispute Resolution at the Pepperdine Caruso School of Law. Stephen has litigated and mediated a myriad of disputes involving commercial, personal injury, property, and professional liability issues during his career. He teaches the Negotiation course as an Adjunct Professor at the J. Reuben Clark Law School.

DAVID “DAVE” KIGHT is Associate General Counsel Employment & Reg. Affairs with Garmin International, Inc. Garmin is a global leader in GPS navigation and consumer technology serving a wide range of interests including automotive, aviation, marine, and outdoor recreation. Dave is a member of the leadership team in the Legal department reporting directly to the Global General Counsel. He serves as the company’s chief labor and employment subject matter expert. He advises on the labor and employment implications of corporate initiatives and business decisions and represents the company in administrative proceedings, arbitrations, and litigation related to labor and employment law matters. He also provides guidance on FDA / wellness initiatives and supports GPS / spectrum issues.

JANE A. KIM is a Partner in the Little Rock, Arkansas office of ALFA International member, Wright Lindsey Jennings. She is a Chicago-area native and has been practicing in the employment law field since 2007, when she moved to Little Rock to start her legal career at Wright Lindsey Jennings. She maintains an active litigation practice, primarily defending a wide range of clients in state and federal court actions—including class and collective actions—involving claims under the various civil rights laws and the wage and hour laws, and claims related to employment agreements. She also regularly provides advice and training on employment law compliance. Ms. Kim serves as Chair of the firm’s Associate hiring committee and is fluent in Korean.

JASMINE KINGSLEY is Chief People and Legal Officer at Hudl, a global leader in sports video technology headquartered in Lincoln, NE. She began her legal career in private practice at law firms in San Francisco and Silicon Valley and focused her practice on technology and intellectual property transactions. She joined Hudl as General Counsel in 2015 and currently heads the company’s global Legal, People Operations, and Brand/Communications teams. Jasmine is an active member of the State Bar of California (admitted 2012) and the Nebraska State Bar Association (admitted 2014). She currently serves as chair of the board of directors of Rabble Mill, a member of the Bryan Health Board of Trustees, as well as a member of the board of directors of Union Bank & Trust, the Cooper Foundation, the Lincoln Community Foundation, and the Lincoln-Lancaster County Board of Health. She formerly served as chair of the Local Business Strategies Subcommittee of the Mayor’s Economic Recovery Task Force (2020 - City of Lincoln, NE). Jasmine was the 2020 recipient of the Lincoln Young Professionals Group (YPG) Young Professional of the Year award. She received a B.A. in International Relations from the University of Pennsylvania (2005) and a J.D. from Harvard Law School (2011). Jasmine resides in Lincoln, NE with her husband, Christopher Kingsley, and two children, Alexander (5) and Aurora (2).

PAUL G. KLOCKENBRINK is a partner with Gentry Locke, the ALFA International member firm in Roanoke, Virginia. Paul represents business clients in all aspects of the employment relationship, including wage and hour laws, discrimination claims, return to work and non-compete/trade secret issues. He has successfully defended companies in jury trials covering a variety of employment issues. Paul regularly speaks and conducts training on various employment law issues. Paul chairs his firm’s Hospitality and Restaurant Practice Group. He received his bachelor’s degree from the University of Vermont and his J.D. degree from the University of San Diego.

KATIE KOEHLER serves as Legal Counsel for Trelleborg Sealing Solutions, a part of Trelleborg Group. Trelleborg is a global engineering

group and leading manufacturer of polymer solutions. In her role, Katie manages disputes in the Americas, negotiates contracts, and provides legal advice and counsel across Trelleborg Sealing Solutions’ Healthcare and Medical, Aerospace, and Industrial business units. She is passionate about making legal trainings as engaging as they can possibly be, viewing training and relationship-building with business teams as some of the most important parts of her role. Katie obtained her BA in Political Science from the College of Saint Benedict and her JD from the University of St. Thomas School of Law.

CHRISTIN KRÄMER is a partner with Tiefenbacher, ALFA International’s member firm in Heidelberg, Germany. Christin co-heads Tiefenbacher’s International Division and is the leading partner of its corporate and commercial practice. Christin advises both German and international clients in all fields of corporate and commercial law, with a particular focus on cross-border transactions. Since 2019 she is entitled to use the specification Bar-Certified Specialist in Commercial and Corporate Law. Christin is, therefore, well experienced not only in transactional law but in all ramifications of corporate law, such as disputes between shareholders, litigation and directors’ and officers’ liability. She currently serves as chair-emeritus of ALFAI’s Future Leaders Practice Group and is the liaison to the International Law Practice Group.

JENNIFER M. LANKFORD is Senior Corporate Counsel for Cracker Barrel Old Country Store, Inc., where she handles all matters related to employment litigation. Jennifer manages the legal litigation team and, in addition to handling employment claims company-wide, she supervises compliance measures and manages the company’s ADR program. Jennifer also oversees the Employee Relations department, which ensures Title VII and Title II compliance related to employees and guests, respectively, through training and investigations. With over 680 stores in 45 states, Jennifer’s role also includes advising on employment law matters affecting the store’s 70,000+ employees. Prior to joining Cracker Barrel, Jennifer was a partner with Thompson Burton, PLLC, in Franklin, Tennessee, where she practiced employment defense litigation and provided compliance training and advice to companies operating nationwide. In 2017, Jennifer was appointed by Governor Bill Haslam to the Tennessee Board of Appeals, the appeals panel for state employees seeking to appeal a demotion, suspension, or termination by the State of Tennessee.

RICHARD A. LATTA is a partner in the ALFA International member law firm in Wisconsin, Stafford Rosenbaum LLP, and the Chair of its Hospitality and Retail practice group, where he focuses on M&A, corporate governance matters, tax law, and succession planning for businesses. Rich has received the recognition of his peers both in Super Lawyers, and in The Best Lawyers in America® for his work in corporate law, tax law, corporate governance law, corporate compliance law, banking and finance law, financial services regulation law, and business organizations. Prior to law school, Rich was associated with an international CPA firm. He received a B.B.A. (in accounting) from the University of Notre Dame, his J.D. from the University of Wisconsin Law School, and an LL.M. (in taxation) from the New York University School of Law, and is admitted to practice in Wisconsin, California and New York.

SERGIO LEEMANN is Director of Aldo Group International GmbH and head of the international legal department of the Aldo Group. The Aldo Group is an international market leader in the footwear industry and produces and sells footwear as well as accessories and fashion jewelry under its own brands as well as for other brands throughout the world. Before joining the Aldo Group, Sergio was part of the international legal division at the Swarovski Corporation focusing on retail and corporate issues before joining private practice for several years. Sergio a Masters degree from the university of Zurich, Switzerland

and is a member of the Swiss Bar Association and a lecturer of a Swiss higher school of education in international franchise matters.

ERIK A. LINDSETH is Senior Vice President and General Counsel of Life Time, Inc. As a wellness pioneer, Life Time is reshaping the way consumers approach their health by integrating where we move, work and live – digitally and physically – all with the primary objective of helping people lead healthy, happy lives. With more than 160 destinations in 41 major markets across the U.S. and Canada, Life Time operates luxury athletic country clubs, owns and produces iconic athletic events and is expanding its brand through Life Time Work premium coworking spaces and Life Time Living high-end leased residences. Erik has served as Life Time's General Counsel since 2010, overseeing the company's legal team, in areas including property development, commercial contracting, corporate governance, employment, consumer protection, intellectual property, licensing and regulatory matters, and litigation management. Erik also plays a key role in supporting Life Time's Environmental, Social and Governance (ESG) initiatives following its return as a public company in October 2021. Along with leading government relations at Life Time, he serves on the board of directors of IHRSA, the principal trade association for the health and fitness industry, as well as IHRSA's advocacy arm, the National Health and Fitness Alliance. Before joining Life Time, Erik worked as an Assistant Attorney General with the Minnesota Attorney General's Office and was an associate in private practice. Erik earned his J.D. from Harvard Law School and graduated with a B.A. from Drake University.

JORGE LOPEZ is Senior Associate General Counsel at the John D. and Catherine T. MacArthur Foundation, where he provides legal counsel and operational support to the Foundation's staff, management, and Board of Directors. Prior to joining the Foundation, he was an Associate Attorney with Adler & Colvin, a San Francisco-based law firm specializing in the representation of tax-exempt organizations and philanthropists. At Adler & Colvin, his practice focused on advising company and private foundations, public charities, and social welfare and religious organizations on all aspects of nonprofit corporate and tax-exempt law. Jorge has a B.A. from Chapman University and earned his J.D. from Loyola Law School, Los Angeles. He received an LL.M. in Taxation, with distinction, and a Certificate in Employee Benefits Law from Georgetown University Law Center. Jorge has taught courses on tax-exempt law at Golden Gate University School of Law in San Francisco; has presented on nonprofit law issues at the Center for Nonprofit and Volunteer Leadership; and has conducted webinars and trainings on governance matters and tax issues facing nonprofit organizations at local and national conferences.

IGNACIO LOPEZ-BALCELLS is founder and partner of the ALFA International Spanish member firm, Bufete Barrilero. He specializes in directing complex transactions, in particular mergers and acquisitions, alliances and associations, designing and carrying out floats on the stock exchange, financial restructurings, and reorganizing corporate groups. He is a legal advisor to several national and foreign companies, both privates and quoted, which he counsels on an ongoing basis on making strategic decisions, drawing on his knowledge on legal and tax consultancy and his extensive business experience. He is a member of the boards of directors of several companies across a range of sectors of the economy, and serves as secretary of the board in several companies. Education: Central University of Barcelona (Law Faculty): Degree in Law; City of London Polytechnic (London): Degree in Business and Tax English Law and International Contract Law; Barcelona Centre of Tax studies: Degree in Tax and Financial Law.

HEATHER MAGNUSON currently serves as Deputy General Counsel at Shaw Industries Group, Inc. Heather supports Shaw's General Counsel and Vice President Chief Legal & Advocacy Officer and various business units by/through coordination of internal and external resources including, but not limited to, retention of outside counsel and service

providers. Heather's day to day responsibilities include overseeing and attending to issues relating to the Litigation Practice Group of Shaw's Corporate Legal Department. Her primary responsibilities include providing legal advice as well as the management of litigation throughout the lifecycle of a case. Much of her current practice involves issues pertaining to product claims, personal injury lawsuits, breach of contract disputes, and construction defect claims.

CHRISTINE L. MAST is managing partner of the defense litigation firm of Hawkins Parnell & Young, LLP, the ALFA International member firm in Atlanta, GA. She is also chair of ALFA International's Professional Liability Practice Group. Christine is the go-to attorney for legal professionals faced with malpractice claims, lawsuits, disciplinary, and ethics issues. A testament to her skillful, pragmatic handling of serious and sensitive claims, she is regularly hired by opposing counsel when they find themselves on the wrong end of a claim. Outside of the courtroom, Christine defends clients against sanctions, licensing, and disciplinary matters. Christine also represents insurance agents and brokers, appraisers, surveyors, and other professionals. Her successful representation is evident in a long list of appellate decisions affirming favorable rulings for her clients, including landmark cases before the Supreme Court of Georgia. Christine was named one of Georgia's top 100 lawyers in 2019, 2020, and 2021 by Super Lawyers and was selected by Best Lawyers as Lawyer of the Year for Professional Malpractice Law Defendants in 2021 and Legal Malpractice Defendants in 2015. She lectures and writes regularly on professional liability, malpractice avoidance, ethics, abusive litigation, and trial procedures.

PHILIP C. MAYNARD is the Senior Vice President, Chief Legal Officer and Corporate Secretary for Tealium Inc., a rapidly growing provider of SaaS based Customer Data Platform services based in San Diego, California, with global offices in London, Frankfurt, Sydney, Singapore, Hong Kong and Tokyo. Phil spent about ten years in private law practice before moving into private industry. Over the last thirty years Phil has served as the senior legal officer for several public companies including National Education Corporation, Wonderware Corporation (industrial automation), Software Systems Division of Invensys plc, Filenet Corporation, Associate General Counsel for IBM (ECM group) and Limelight Networks. Phil and his wife have four beautiful, successful daughters. Phil's business mantra is "If I'm going to work for a living, I'm going to have a good time doing it!"

RYAN MCGARY is the Global General Counsel of AAF International ("AAF"), the world's largest manufacturer of air filters and air filtration equipment for commercial, industrial, cleanroom, transportation, and power generation applications. Ryan is based in AAF's US headquarters in Louisville, KY. In his current role, Ryan is responsible for all legal matters impacting AAF as well as regulatory and compliance matters. Prior to joining AAF in 2006, Ryan was a commercial litigation attorney in Cincinnati, OH.

MINDY MCPHEETERS serves as Senior Vice President, General Counsel and Corporate Secretary for Spirit AeroSystems. She joined Spirit in 2015 and currently oversees the legal department across Spirit's global enterprise. Prior to appointment of this role, McPheeters served as Vice President, Deputy General Counsel. In addition, she has held positions overseeing all aspects of Spirit's legal functions, including Litigation, Commercial, Employment, and also Compliance. Before joining Spirit, McPheeters was in-house counsel for Delta Dental of Kansas, and was a partner at Stinson LLP (formerly Stinson Morrison Hecker LLP). Mindy holds a BBA in Accounting from Wichita State University and a Juris Doctorate from the University of Kansas School of Law.

ELLIOT MILLER is General Counsel and Senior Vice-President of Wowza Media Systems, which is based in Colorado with offices in Berlin, Germany and Stockholm, Sweden, and employees around the world. For more than 15 years, Wowza has powered 35,000+ video

implementations globally across a range of end markets, including media, enterprise, government, aerospace, healthcare, and more. Wowza's high-availability video platform is trusted by developers and technology teams at discerning institutions across industries, including NASA, SONY, Facebook, Jewelry TV, University of Oregon, and thousands more globally. Elliot leads Wowza's global people operations, legal affairs, compliance programs, and corporate development activities. With more than 15 years of experience providing in-house legal counsel to technology and services companies, Elliot works to attract and retain great colleagues by building a collaborative, entrepreneurial culture with compelling employee benefits. In Elliot's legal and corporate development roles, he leads initiatives and processes to support Wowza's rapid growth while managing the company's risk.

MACKENZIE MONACO is an attorney with ALFA International member firm Monaco Cooper Lamme & Carr, PLLC, in Albany, New York. She maintains an active litigation practice representing a wide range of clients, from individuals and local businesses to national corporations, in state and federal courts throughout New York. Mackenzie delivers counseling, risk management and tort defense services to the hospitality and retail, construction, insurance and health care industries. She also maintains an active trusts and estates practice.

TAMARA NELSON is a shareholder with ALFA International member firm Merrick, Hofstedt & Lindsey, P.S. in Seattle, Washington, where she maintains an active litigation practice on behalf of corporate and institutional clients. Her practice focuses on commercial and complex torts, employment law, and professional liability. Tamara has obtained successful outcomes on behalf of her clients in state and federal trial courts and has successfully argued before the Washington State Court of Appeals. She is admitted to practice in all Washington state and federal courts, as well as the 9th U.S. Circuit Court of Appeals; she is also a member of the King County Bar Association, where she served on the Board of Trustees 2011-2014. In addition to her work, Tamara devotes substantial time to her community through her volunteer work with King County Community Legal Services and Lawyers Helping Hungry Children, a Washington nonprofit organization committed to ending childhood hunger.

COURTNEY NICHOLS is a Shareholder and Labor and Employment Practice Group Leader of the Michigan ALFA International law firm, Plunkett Cooney. Ms. Nichols represents employers in workforce-related litigation under state and federal law, including disputes involving allegations of wrongful termination, discrimination, retaliation and wage and hour violations. Ms. Nichols also advises employers on complicated contractual issues and conducts in-house training for employers of various sizes. In addition, she represents employers in administrative matters before the NLRB, DOL and EEOC. Ms. Nichols was selected as an Up & Coming Lawyer by Michigan Lawyer's Weekly and named a Rising Star by Michigan Super Lawyers.

JOHN OSGATHORPE is a shareholder, and serves as the president and managing partner, of Taylor Day, the ALFAI member firm in Jacksonville, Florida. In his business litigation and complex torts practice he protects the interests of companies, management teams, business owners, and stakeholders in a diverse array of commercial and torts disputes. His practice includes most types of business and commercial disputes including breach of contract claims, shareholder disputes, corporate governance disputes, misappropriation of trade secrets, and UCC matters while his torts practice includes products defects cases, truck and auto accidents, defamation, and premises liability. He also handles disputes regarding real estate and wills & trusts. John is currently the Vice Chair & Marketing Chair for ALFA International's Business Litigation Practice Group. He is an active member of ALFAI's Complex Torts & Products Liability Steering Committee as well as Transportation Steering Committee. He has presented at several ALFA International Client

Seminars, Business Litigation seminars, and Complex Torts & Products Liability seminars. John previously served on ALFA's Board of Directors and as its Treasurer, along with several other ALFAI committees.

CHRISTOPHER PAGE is a partner with Young Moore and Henderson P.A., the ALFA International member firm in Raleigh, North Carolina. Chris is an experienced trial attorney, with special emphasis on representation of clients in the hospitality and retail industries, where he represents several national clients with all their legal needs, including claims relating to employment, business disputes, product liability, premises accidents, insurance coverage and construction defects. Chris has been named as a "Super Lawyer" in business litigation for many consecutive years and is listed in "Best Lawyers" for insurance law. After graduating summa cum laude from Duke University, Chris earned his law degree from Yale Law School where he served as senior editor for the Yale Law Journal. Chris is a frequent speaker at ALFAI seminars and has created many presentations on a variety of litigation and management topics. Chris was named ALFAI's "Attorney of the Year" in 2017. Chris is the former chair of ALFAI's Hospitality & Retail Practice Group, former chair of ALFAI's Marketing Committee, a former member of ALFAI's Board of Directors and was ALFAI's 2022 International Client Seminar program chair.

JENNIFER PEDEVILLANO is a partner with ALFA International member firm, Halloran Sage, in New Haven, Connecticut. She focuses her practice in the areas of Construction, Labor & Employment, and Litigation, and has extensive experience in contract disputes, products liability, complex commercial and corporate litigation matters as well as representing employers in all areas of labor and employment law. Jen's clients range from large corporations to individuals. She has experience trying cases before arbitrators, judges, and juries, and she frequently handles large complex matters involving significant electronic discovery. Jen uses technology to the client's benefit in the preparation of a case for litigation as well as during trial/arbitration. She earned her BA, magna cum laude, from DeSales University and her JD, magna cum laude, from Quinnipiac University School of Law.

TIM PEEPLES is a director at Daniel Coker, the ALFA International firm in Oxford, Mississippi. Tim serves as the chair of the firm's Employment practice group and litigates on behalf of public and private employers in all areas of employment law, including discrimination and civil rights issues, wage and hour matters, employment contracts, covenants not to compete, and wrongful discharge. He also regularly advises employers on matters such as employee handbook provisions, hiring and firing decisions, and other employment-related practices and procedures. Tim is a frequent presenter on Title VII, ADEA, FMLA, and FLSA issues.

RON PEPPE is EVP of Shared Services, Legal and Human Resources for Canam Steel Corporation, and oversees legal, human resources, health and safety, and risk management issues for the company. Canam manufactures steel construction products and, along with its sister company FabSouth, are one of the largest steel fabricators in North America. Ron previously served as VP Law and Technology for the Association of Corporate Counsel and Vice President and Associate General Counsel at Prudential Home Mortgage. Ron is the co-chair of the ERISA subcommittee of the ACC Employment and Labor Law Committee and previously served as co-chair of the ACC Environment and Sustainability Committee. Ron has served as a member of the City Council and as Chairman of the School Board of Falls Church, Virginia and was President of the Board of Education of Frederick County, Maryland.

JORDAN RATTRAY is the General Counsel and Corporate Secretary for the Geosyntec Family of Companies, a two-thousand-person environmental firm with offices on three continents. She chairs the company's risk management committee and serves on the companywide executive committee. In her seven years leading the department, she created legal frameworks and supported her

colleagues as the company doubled its workforce, expanded into new countries, and took on a private-equity investor. To address these transformations and support both colleagues and external clients, she has grown the legal department to encompass subject-matter experts in contracting, risk management, compliance, corporate governance, and intellectual property. Relying on her deep experience supporting engineering consultants, Jordan provides practical, business-oriented, and risk-aware advice. She and her department navigate the legal aspects of the firm's civil and environmental consulting work, including conducting go/no-go assessments, creating and reviewing agreements and contracts, managing outside legal counsel, handling claims against the company, managing global insurance and supporting the company's acquisition strategy.

CAREN RIES is Associate Counsel, Assistant Secretary, and Litigation Manager for Skyline Champion Corporation and its subsidiaries, including Champion Home Builders, Champion Modular, Titan Factory Direct, Champion Retail Housing, and Star Fleet Trucking. She joined the Champion family in 2018 as Associate Counsel and Litigation Manager. As one of three lawyers with the Company, she is a Corporate Generalist by default whose areas of responsibility continue to expand and evolve daily. Prior to joining Champion, Caren was a career litigator in private practice with the law firms Trott & Trott, P.C., Crimando & Cleland, P.C., and Kitch Drutchas, Wagner, Valitutti & Sherbrook, P.C., with practice areas focused on real property, family law, and medical malpractice and product liability defense. Caren is a graduate of Wayne State University Law School in Detroit, Michigan.

DANIEL ROSENBERG, a partner in the ALFA International UK member law firm, Charles Russell Speechlys, represents a broad spectrum of UK and international companies and is experienced in a wide range of corporate issues, including M&A, joint ventures, strategic alliances and corporate finance transactions. He has a particular focus on inward investment, especially from the USA and Canada. Daniel is recognized as a leading cross-border M&A lawyer and as a leading cross-border Corporate Governance lawyer in the independently researched Who's Who Legal: M&A and Governance 2023. He is also the Chair of the ABA Technology in M&A Subcommittee, a Co-Chair of ALFA International's Corporate Transactions Practice Group and a Director of BritishAmerican Business. Daniel is General Editor of Sweet & Maxwell's Practical Commercial Precedents, as well as being co-author of the Public Companies section of that work. He is a regular speaker on topics related to international M&A. Daniel is admitted to practise in England and Wales.

GERO SCHNEIDER is head of Tiefenbacher's International Division and a core member of its employment and corporate practice. Tiefenbacher is the ALFA International member firm in Germany. Gero advises both German and international clients in all fields of employment law as well as any related corporate law issue with a particular focus on cross-border transactions. Gero has a wide range of experience in employment and corporate business matters, including litigation and arbitration, collective matters as well as cross-border transactions. Before joining Tiefenbacher as a partner in 2013 Gero practiced as General Counsel with the supermarket chain Lidl and another medium sized law firm as a partner. Gero earned a doctor degree from Leipzig University and a Master of Comparative Law from the University of Adelaide (South Australia). He is author of many legal publications. Gero is also a past member of ALFA International's Board of Directors and used to co-chair the International Law Practice Group of ALFA International. He serves on a non-profit board of a trust which is committed to facilitating, supporting, and promoting of various areas for a fulfilled, self-determined life in old age.

ROBERT G. SMITH is a capable litigator and is a partner at Mayer LLP, the ALFA International firm in Houston, Texas. Rob is on the steering committee of the ALFA International Product Liability & Complex Torts Practice Group, and is a member of the Business Litigation and Corporate

Transactions Practice Groups. Rob is the outgoing Chair of the Medical Defense & Health Law Committee in the International Association of Defense Counsel and he is also a member of the Product Liability and Business Litigation Committees. Rob represents manufacturers (heavy equipment, medical devices, durable medical equipment, sporting goods), health care providers, and other businesses in litigation as well as transactional matters. Rob graduated Phi Beta Kappa with a degree in mathematics from Louisiana State University and attended law school at the University of Houston College of Law. He is Board Certified in Personal Injury Trial Law by the Texas Board of Legal Specialization and has tried a wide variety of cases during his 27+ years of practice.

ANNIE RICCI TAYLOR serves as Associate General Counsel for Mariner Wealth Advisors. She graduated from Southern Methodist University in Dallas, Texas, with a BA in psychology, then earned her law degree from DePaul University School of Law in Chicago, Illinois. She worked in private practice in Chicago for ten years dedicated to family law before joining Mariner in 2015.

KATHY TERRY is a Director with Phillips Murrah P.C., the ALFA International member firm in Oklahoma City, OK. Her practice focuses on insurance coverage and bet-the-company litigation, crisis management and labor and employment for management. A substantial portion of Kathy's practice includes representing both major insurance companies and their insureds in coverage and liability disputes for commercial, personal, life and specialty lines. In addition to coverage advice and defense, including extra contractual defense, she also provides claims handling training and consultation for her insurance clients. For policyholders, mostly businesses, Kathy gives guidance on risks and exposures for which insurance is recommended, coverage audits and helps resolves questions of coverage between her clients and their insurance companies. Kathy also advises clients in large loss, existential impact litigation and public management of company crises. Kathy's employment law practice includes litigation in wage/hour, discrimination, contract, and workplace torts, as well as labor arbitration, collective bargaining and consulting on wage differential, workplace culture and ESG matters.

KELVIN TANNER is a Partner in the ALFA International UK member law firm, Charles Russell Speechlys' immigration team and a specialist in both corporate and private client immigration. His corporate clients range from multinational companies through to SMEs and start-ups and he assists them on matters related to their immigration strategy, compliance and the relocation of their staff into the UK. Kelvin assists private clients on the full range of UK immigration applications, with a particular specialism working on the immigration matters of high net worth individuals seeking an alternative residence or citizenship. Kelvin regularly assist clients on the immigration aspects of UK inward investment matters, working with companies and entrepreneurs. He also regularly works on complex immigration matters and has had a number of notable successes in persuading the Home Office to exercise their discretion to approve applications outside of the Immigration Rules. Where necessary, Kelvin liaises with a range of Government contacts on the complexities and processing of his applications. Kelvin is a regular speaker at seminars and conferences on both private and corporate immigration matters.

JUAN PABLO TRIANA is Co-Founder and Managing Partner of ALFA International member firm, Triana, Uribe & Michelsen, in Bogotá, Colombia. Juan Pablo manages the corporate department of the firm, with experience in both local and international tax law matters, incorporation of companies, company structuring, transactional issues, due diligence, M&A, tax and business planning, corporate governance and negotiation of commercial contracts. President of the Board of Directors of two companies and member of several more, Juan Pablo has been recognized among his peers for his exceptional negotiating skills when acting for multiple local and

international industries in well-known Colombian cases. Furthermore, he is a member of the Colombian Institute of Tax Law (ICDT), the International Bar Association (IBA) and Treasurer of Licensing Executive Society (LES) - Chapter Andean Countries. He graduated as JD from Los Andes University School of Law and holds a Graduate Degree in Tax Law, where he also was an assistant professor on tax law.

SONIA VALDES is the Vice President-Claims, Medmarc Insurance Group. Ms. Valdes is responsible for managing a team of dedicated claims professionals as well as overseeing technical and administrative issues within Medmarc's Claims Department. Her responsibilities include directing mass tort litigation, training and developing staff, assisting with policy development, advising underwriters on risk management, and expanding Medmarc's litigation management services. Ms. Valdes joined Medmarc in August of 2013. Prior to Medmarc, Ms. Valdes was Assistant Vice President with Chubb & Son, Inc., in its headquarters in Warren, New Jersey, for 14 years. She had worldwide responsibility for managing Chubb's Life Sciences Claims Core. Ms. Valdes has extensive experience in evaluating coverage and liability issues in environmental, mass tort, and health science litigation. She has been an admitted attorney in New Jersey since 1992 and is a member of the IADC and CLM. She received her undergraduate degree in Biochemistry from Rutgers University in 1984 and her law degree from Brooklyn Law School in 1991.

DAVID T. VANALEK is the Chief Legal and Compliance Officer and Corporate Secretary of Richmond National, a specialty excess and surplus lines insurance company dedicated to writing hard to place risks for small and mid-sized businesses headquartered in Richmond, Virginia. David is responsible for all corporate governance, regulatory, compliance, claims law, and litigation activities of the company and its affiliates, and serves as legal advisor to the leadership team, business units, and board of directors. Prior to joining Richmond National, David served as the Claims Chief Operating Officer at a global Fortune 500 insurance carrier, where he led the day to day operational support for all claims divisions responsible for all lines of business throughout North America and Bermuda. David also served for years in various claims leadership roles in the professional liability, cyber liability and management liability product lines. Prior to joining the insurance industry, Mr. Vanalek was in private practice as a commercial litigator, serving clients throughout California and Illinois. He received his Bachelor's degree from the University of California, Los Angeles, and his law degree from the University of California, Davis, where he served as an Editor on Law Review, as well as a judicial extern for an associate justice of the California Supreme Court. Mr. Vanalek is a frequent speaker on insurance, claims, technology, professional liability, cyber liability and management liability issues.

CARLOS VERA is an attorney with the ALFA International member firm Johnson & Bell, Ltd in Chicago, Illinois. He concentrates his practice in

general and complex commercial litigation, particularly in the areas of business torts, professional liability, white collar defense and contractual disputes. Carlos has represented individuals and business entities in state and federal court dealing with issues concerning breach of contract, breach of fiduciary duty, trade secrets, unfair competition, shareholder rights, and commercial development disputes. Carlos has also represented clients in regulatory matters before the Illinois Department of Financial and Professional Regulations, and the Illinois Attorney Registration & Disciplinary Commission. Prior to joining Johnson & Bell, Carlos worked as an Assistant State's Attorney in Cook County where he gained vast trial experience from prosecuting over 200 bench trials and seven jury trials to verdict. Carlos' skills as a trial attorney have been recognized by his peers in civil practice. Carlos was named as one of the "Forty Illinois Attorneys Under Forty to Watch" for 2020 by Law Bulletin Publishing Company, publishers of Chicago Lawyer magazine and the Chicago Daily Law Bulletin. In addition to being an active member of ALFA International, Carlos is also an active member of the Illinois State Bar Association ("ISBA"), a member of the ISBA Civil Practice & Procedure Section Counsel, and the ISBA Assembly, which is the policy making body of the ISBA.

ALYSSA R. WAN is a partner in the ALFA International member law firm in Miami at Fowler White Burnett, P.A., where she focuses on tax-exempt organizations, estate planning and tax law, domestically and internationally. Additionally, she has developed a special expertise in assisting clients to carry out their charitable goals by supporting non-U.S. charities and activities, either by forming U.S. foundations or preparing equivalency determination letters, including applying directly to the U.S. Internal Revenue Service to obtain favorable rulings. Alyssa serves as a co-Vice Chair of the Charitable Planning and Exempt Organizations Committee of the Florida Bar as well as on the Florida Bar Not for Profit Corporation Action Joint Task Force. Alyssa has received the recognition of her peers in Best Lawyers Ones to Watch in America™ for her work in trusts and estates as well as from local organizations. She received a B.S. in Industrial & Labor Relations from Cornell University, J.D. from Washington University School of Law in St. Louis, cum laude, and an LL.M. (in taxation) from the University of Miami School of Law, and is admitted to practice in Florida.

WINNIE YEUNG is a Legal Director at Lime, where she serves a dual role of Head of Litigation and Global Claims at Lime. As a trusted business advisor for the C-Suite, she provides comprehensive guidance and insights on litigation & risk mitigation practices, as well as on regulatory, product, consumer, and IP matters. She oversees a complex and diverse portfolio of legal claims across multiple jurisdictions and regions, executing strategy that aligns with the business objectives. She is passionate about building and scaling a world-class legal team that supports Lime's vision of revolutionizing urban mobility and sustainability.

GENERAL INFORMATION

MEETING LOCATION

El Conquistador Resort
1000 Avenida El Conquistador
Fajardo, 00738
Puerto Rico
Tel: (787) 863-1000
www.conquistadorresort.com

REGISTRATION

Please contact ALFA International Headquarters to register.

ATTENDANCE IS OPEN ONLY TO MEMBERS OF ALFA INTERNATIONAL AND THEIR INVITED COMPANIONS AND IS LIMITED TO AGES 21+.

ATTIRE

The attire for the educational sessions throughout the conference is business casual. Resort casual attire is appropriate for the social events and casual attire for the optional activities. Thursday, Friday and Saturday night's receptions and dinners are outdoors so layers are recommended.

CLE CREDIT

ALFA International is an approved CLE provider in Illinois, California & Pennsylvania and certifies this program has been approved for 5.75 hours of CLE in these states. However, seminars are designed to meet CLE requirements, regardless of jurisdiction. To receive CLE credit outside of these states, attorneys should apply directly to their state's governing CLE board. Helpful links and information on how to apply for course credit are available on the ALFA International website and staff are available to assist with any concerns.

SPECIAL ACCOMMODATION

If you need any special accommodations, including a nursing room, special dietary meals, ADA access or other needs, please reach out to ALFAI staff in advance of the meeting and we will ensure that necessary accommodations are provided.

SEMINAR CONTACTS

Aria Trombley Wolf
awolf@alfainternational.com

Michelle Jones
mjones@alfainternational.com



ALFA International
THE GLOBAL LEGAL NETWORK

STAY CONNECTED WITH ALFA INTERNATIONAL

LinkedIn X Facebook YouTube

980 N. Michigan Ave.
Suite 1180
Chicago, IL 60611
Tel: (312) 642-ALFA (2532)
Fax: (312) 642-5346
www.alfainternational.com