



# ALFA International

THE GLOBAL LEGAL NETWORK

**PROGRESS IS COMING, SO LEAD,  
FOLLOW, OR GET OUT OF THE WAY**

**2023 INTERNATIONAL CLIENT SEMINAR**

**MARCH 2-5, 2023 | LA QUINTA RESORT & SPA | LA QUINTA (PALM SPRINGS), CALIFORNIA**

**[www.ALFAInternational.com](http://www.ALFAInternational.com)**

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We've all heard the hubbub around green energy, and there is little question that developing and maintaining a sustainable green energy model may help slow the spread of global warming. However, simply saying we're "going green" is not enough. Not only will going green take an enormous amount of R&D and infrastructure change but, it will take ingenuity and a willingness to make those changes necessary to realize the benefits of green energy.

The title of this year's ICS comes from the sign over the dining facility at Infantry School. It is a saying we will need to embrace globally if we are ever truly going to reap the benefits of green energy. The switch to green energy must be efficient and effective to have the desired effect.

Many have touted the increased use of electric vehicles as a great start. Forget for a moment that many of us may like big powerful muscle cars. While electric vehicles may be able to go fast, can they give a car enthusiast that rumble that they really love? Can you sell John Q. Public on this new product? Moreover, will the switch to electric vehicles require us to have as many charging stations as we do gas stations? How would we ever get there?

With all the unfamiliar and unpleasant changes that we have lived through in the past two years it seems that many residuals remain, including economic difficulties, recruiting & retention challenges and the move away from brick-and-mortar. This year's ICS will highlight innovations to the practice of law while also recognizing the value of old lessons and structures. Sessions will address changes to the workforce in both structure and mentality, equity & inclusivity, creative destruction and arbitrations among others. Roundtable sessions on Saturday will feature in-depth discussions on new technology in the workplace, mobile apps, wellness, complex restrictive covenants, IP risks, workplace security, cross-border discovery and supply-chain issues. The programming will be bookended by discussions of the challenges and opportunities for success that going green brings and the adaptations we can expect to make.

Understanding that progress is inevitable, we can either evolve with it or be run over by it. So, sit back and enjoy the ride. Unlike an electric vehicle, the one thing this seminar won't be is quiet.



**Shaun Henry**  
*Program Chair, 2023 International Client Seminar*  
MCNEES WALLACE & NURICK LLC  
Harrisburg, Pennsylvania

## WELCOME TO PALM SPRINGS

Nestled at the base of the Mount San Jacinto Mountains, Palm Springs, California is known for its crystal blue skies, year-round sunshine, stunning landscape, palm tree lined streets and starry nights. Often described as a small city with the cultural amenities of a large metropolitan area, the shopping, entertainment, dining and recreational opportunities are truly world-class. Amongst the over 130 resorts and hotels in the area lies the beautiful La Quinta Resort & Club, the site of this year's International Client Seminar. Built in the 1920's by San Francisco businessman Walter H. Morgan, La Quinta provided a place of solitude and relaxation for Hollywood's elite, far away from the glare of the spotlights. As the legends of stage and screen have come and gone, La Quinta has expanded into a playground for championship golf, world-class tennis, fine dining and blissful spa experiences. The resort is located approximately 30 miles from Palm Springs Airport (PSP), 90 miles from LA/Ontario airport (ONT) and 145 miles from Los Angeles International Airport (LAX). A rental car is recommended if you are flying into ONT or LAX and is easily accessible at both airports. A taxi is recommended if you are flying into PSP.



## 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.

## 2023 INTERNATIONAL CLIENT SEMINAR COMMITTEE MEMBERS



**Shaun Henry**  
*Program Chair, 2023 International Client Seminar*  
MCNEES WALLACE & NURICK LLC  
Harrisburg, Pennsylvania



**Cate Jackson**  
*Vice Chair & Presentation Consultant, 2023 International Client Seminar*  
GENTRY LOCKE  
Roanoke, Virginia



**Chris Page**  
*Chair Emeritus, 2023 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



**Tim Peebles**  
*Course Book Editor, 2023 International Client Seminar*  
DANIEL COKER  
Oxford, Mississippi



**Bonnie Dixon**  
ATSUMI & SAKAI  
Tokyo, Japan



**Joe Fortner**  
HALLORAN SAGE  
Hartford, Connecticut



**Joel Hlavaty**  
FRANTZ WARD LLP  
Cleveland, Ohio



**Christin Kraemer**  
TIEFENBACHER  
Heidelberg, Germany



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



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



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

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

*Fiesta Ballroom 5-10*

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

*Frank Capra Ballroom*

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**

*Fiesta Ballroom 11-13*

All ALFA International attorneys are required to attend.

**5:30 p.m. – 6:30 p.m.**

**Women's Initiative Reception**  
*Morgan's Patio*

“To listen well is as powerful a means of communication and influence as to talk well,” said Chief Justice John Marshall while not wearing noise-canceling headphones and trying to guess what a teammate is saying before the game clock runs out—which is exactly what we'll be doing to kick off this year's seminar. (Chief Justice obviously missed out!) Join your fellow women attendees for some drinks and a friendly competition to see whose lip reading skills rule.

**Jane Kim**  
*Women's Initiative Liaison*  
WRIGHT LINDSEY JENNINGS  
Little Rock, Arkansas



**6:30 p.m. – 9:30 p.m.**

**A DESERT OASIS**  
Welcome Reception, Buffet Dinner & Registration

*All Grass Area*

After a long day of travel, come spend the evening in an atmosphere that reflects the beauty of the La Quinta resort surroundings. Keep in mind that this once sleepy farming town is now a growing city but still remembers its roots and recalls the Spanish influence that resonates throughout the resort. Set in the pristine garden of the La Quinta Resort, this welcome party will allow you to enjoy the outdoor architecture and flora of the resort and an opportunity to take in the stars.

*Suggested Attire:* Come as you are. This evening's meal is on a lawn outdoors so casual attire, including flat shoes and light layers, are suggested.

**9:30 p.m. – 12:00 a.m.**

**After-Hours Hospitality Suite**

*Frank Capra Ballroom*

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 Liaisons:



**Cate Jackson**  
GENTRY LOCKE  
Roanoke, Virginia



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

MARCH 3, 2023

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

*Waterfall Lawn*

Attendees: 7:00 a.m. – 8:00 a.m.

Spouses: 7:00 a.m. – 9:00 a.m.

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

*Main Lawn*

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. – 8:20 a.m.**

**Introductory Remarks**

*Fiesta Ballrooms*



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



**Schaun Henry**  
*Program Chair, 2023 International Client Seminar*  
MCNEES WALLACE & NURICK LLC  
Harrisburg, Pennsylvania



**Jessica Zaroski Bauer**  
*Chief Executive Officer*  
ALFA INTERNATIONAL  
Chicago, Illinois

**8:20 a.m. – 9:20 a.m.**  
**GENERAL SESSION**

**The Future is Ours to See**

Today we are inundated with urgent calls to go green. The assertion is that the use of fossil fuels needs to become a thing of the past lest the inhabitants of this planet suffer grave environmental consequences, culminating in what may be the death of us all. The expectation and indeed the mandate that we switch from fossil fuels to alternative energy is no doubt easier said than done. Can we ever really be free of fossil fuels, and if we ever do get there what unforeseen consequences can we expect? Join us as we explore the values and hidden pitfalls of alternative non-fossil fuel energy in the United States and the beyond.



**John Osgathorpe**  
*Moderator*  
TAYLOR DAY, P.A.  
Jacksonville, Florida



**Curtis Stambaugh**  
*Assistant General Counsel*  
ENERGY TRANSFER  
Harrisburg, Pennsylvania



**Emily Fisher**  
*General Counsel, Corporate Secretary, and Senior Vice President, Clean Energy*  
EDISON ELECTRIC INSTITUTE (EEI)  
Washington, DC



**Nicole Tung**  
HALLORAN SAGE  
Hartford, Connecticut

9:20 a.m. – 9:40 a.m.

**BREAK**

9:40 a.m. – 10:40 a.m.

**BREAKOUT SESSIONS – ROUND 1**

**BREAKOUT 1**

**BE AN ALLY, OR BETTER YET, AN ACCOMPLICE: AN OPEN DIALOGUE ON HOW TO NAVIGATE EVOLVING EXPECTATIONS ABOUT EQUALITY AND FAIRNESS IN EVERYDAY ENCOUNTERS AND DEALING WITH MICROAGGRESSIONS**

The pandemic, the murder of George Floyd, appalling incidents of police brutality and an overall increase in evident racial injustice began important and necessary conversations about the various discriminatory practices, biases and microaggressions that plague our society, firms and companies. Awareness is only the first step. Deep dialogue and active consciousness is necessary to tackle and address these biases and to understand the deep rooted issues with microaggressions. Without doing so, firms and companies risk creating a homogeneous culture where everyone has the same beliefs, carries the same values. In the end, if left unchecked, these biases will stifle growth, creativity, effect retention, and leave your firm and company stagnant. This program will offer practical tips and shared, personal experiences, to help those in attendance move to be allies, and better yet, accomplices in fostering equity.



**Barath Raman**  
Moderator  
LEWIS WAGNER, LLP  
Indianapolis, Indiana



**Kym Wellons**  
VP, Human Resources,  
Legal and Sustainability  
SILGAN DISPENSING  
Richmond, Virginia



**Grace McDonell**  
FASKEN MARTINEAU  
DUMOULIN LLP  
Vancouver, BC, Canada



**Scott Rusert**  
NILAN JOHNSON  
LEWIS PA  
Minneapolis, MN



**Nicole Brunson**  
Head of Litigation  
& Disputes  
ARRIVAL  
Davidson, North Carolina



**Jacqueline White**  
Associate General Counsel  
ILLINOIS TOOL  
WORKS INC.  
Glenview, Illinois



**Antwan Phillips**  
WRIGHT LINDSEY  
JENNINGS  
Little Rock, Arkansas

**BREAKOUT 2**

**BRAVE NEW “LABOR” WORLD**

We will consider and discuss labor management and employment considerations in a post-COVID, remote work, competitive labor market. What can companies do to recruit, and retain talent, and what are the unique obstacles regarding management, performance tracking and advancement in the new world order?



**Kathy Terry**  
Moderator  
PHILLIPS MURRAH P.C.  
Oklahoma City, Oklahoma



**Barbara Kelley**  
Associate General Counsel  
CLAYTON HOMES  
Maryville, Tennessee



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



**Ben Gross**  
Chief People Officer and General Counsel  
BACKCOUNTRY.COM, LLC  
Park City, Utah



**Paul Klockenbrink**  
GENTRY LOCKE  
Roanoke, Virginia

**BREAKOUT 3**

**AFTER THE EVE OF CREATIVE DESTRUCTION**

“Creative Destruction,” also known as Schumpeter’s Gale, is a concept first discussed in the works of Karl Marx, whereby changes that undermine or destroy an existing system or order actually allow for innovation, growth, and rebirth. Since 2019, our society, the business world and the legal profession have faced multiple disruptions, including the pandemic, supply chain issues, inflation, resources issues, war and more. As a result, changes — both micro and macro — have occurred, and more are yet to come.

After a short discussion about the theory underlying “creative destruction,” and thoughts by futurists such as Alvin Toffler and Ray Kurzweil, our panel will discuss the history of transformative events (past and current), how they have changed the business and legal environments of the times and how successful businesses historically have grown from such change. We will then examine creative responses—both existing and proposed—where businesses have identified and taken advantage of those “destructive” forces in order to develop and adopt improved ways of furthering their business goals and practicing law in the new environment. Finally, the panel will offer suggestions for our audience’s consideration about not just surviving, but thriving, in these “interesting times.”



**Joe Fortner**  
Moderator  
HALLORAN SAGE  
Hartford, Connecticut



**Larry Parsons**  
Chief Administrative Officer  
MCLANE COMPANY, INC.  
Temple, Texas



**Mark Werle**  
RYAN SMITH & CARBINE, LTD.  
Rutland, Vermont



**Joe Kang**  
Assistant General Counsel  
KONE INC.  
Lisle, Illinois



**Gero Schneider**  
TIEFENBACHER  
Heidelberg, Germany

10:40 a.m. – 11:00 a.m.

**BREAK**

11:00 a.m. – 12:00 p.m.

**BREAKOUT SESSIONS – ROUND 2**

**BREAKOUT 1 MOVE OVER, MILLENNIALS... AND WELCOME GEN Z!**

Just when you thought you understood millennials, a new generation has entered the chat. Welcome Generation Z! As we are looking forward, we must learn more about the newest members of the workforce, jury pool and potential claimants. Hear from a panel of millennials who are excited to introduce you to the characteristics, perspectives and values of the next generation.



**Kate Martz**  
*Moderator*  
BAYLOR ENVEN, LLP  
Lincoln, Nebraska



**Hannah Schmidt**  
*Lead Attorney*  
AMERITAS LIFE  
INSURANCE CORP  
Lincoln, Nebraska



**Ryan Wiesner**  
*Senior Counsel &  
Director of Litigation*  
BRANDSAFWAY  
Waukesha, Wisconsin



**Andre J. Webb**  
GERMAN, GALLAGHER  
& MURTAGH, P.C.  
Philadelphia,  
Pennsylvania

**BREAKOUT 2 HOW THE COVID-19 CRISIS HAS RESHAPED THE PRESENTATION, TECHNIQUES & TACTICS IN ARBITRATION PRACTICE**

The pandemic has reshaped the landscape of arbitration. Many of those changes appear to be here to stay. This panel will explore how the COVID-19 pandemic caused changes in the world of arbitration and how those changes continue to affect arbitration as we move into a new normal. Topics include:

- How COVID-19 caused an acceleration of virtual technology;
- How the future use of video conference hearings and affidavits in lieu of live testimony will affect the presentation of evidence;
- Electronic records, rulings and wards;
- Challenges for remote advocacy including witness prep, flexible procedural considerations and time/cost factors.



**Steve Cologne**  
*Moderator*  
HIGGS FLETCHER & MACK, LLP  
San Diego, California



**Brendan Taylor**  
MILLS OAKLEY  
Perth, Australia

**BREAKOUT 3 IF THAT'S MOVIN' UP, THEN I'M MOVIN' OUT: IDEAS ON HOW TO PREVENT YOUR EMPLOYEES (AND YOUR MANAGEMENT TEAM) FROM HAVING A HEART ATTACK (ACK, ACK, ACK, ACK, ACK) – (SOURCE - BILLY JOEL)**

The pandemic experience has highlighted the need for companies to do more, elevating employee mental health and well-being to a priority along with other health and safety issues. A 2021 study showed a 300% increase in patients presenting with behavioral health concerns – a staggering increase, with the trend continuing as the year went on. And that's just the tip of the iceberg. Employee priorities have now shifted from a compensation-centric focus to greater emphasis on location, culture and benefits.

This panel will explore what employees value in 2022, 2023 and beyond and how businesses can balance these new desires and concerns with traditional efforts to protect the company and mitigate risks. This panel will also discuss embracing new ways of working, identify value changes, and unique ways companies have forged into providing non-traditional support to employees, along with ideas on how to address critics of the “new” way of doing business.



**Courtney Nichols**  
*Moderator*  
PLUNKETT COONEY  
Detroit, Michigan



**Cherise Latortue**  
*Associate General  
Counsel*  
FLYNN RESTAURANT  
GROUP  
San Francisco, California



**Christin Krämer**  
TIEFENBACHER  
Heidelberg, Germany



**Tim Peeples**  
DANIEL COKER  
Oxford, Mississippi

**BREAKOUT 4 THE EVOLUTION OF M&A DUE DILIGENCE—NEW ISSUES IN A NEW WORLD**

Some people think due diligence (DD) is a bit boring, but anyone who has been associated with an M&A deal that went wrong knows how crucial DD is. Sellers that don't know every detail about their company will get nailed in the buyer's DD and may pay the price (literally) for things they could have fixed earlier. Buyers that don't spot issues before closing risk buying major problems. Compounding this, DD has evolved to include risks that hardly existed a decade ago. Our panel will discuss top DD issues and some of these recent developments including ESG (environmental, social, governance); use of AI powered technology in DD; evolution of DD for multi-site/multi-jurisdiction deals; cyber and IP DD; DD in a COVID world; representation & warranty insurance; and red flag issues for international/US transactions.



**Rich Latta**  
*Moderator*  
STAFFORD ROSENBAUM LLP  
Madison, Wisconsin



**Brett Cowell**  
COWELL CLARKE  
Adelaide, Australia



**Daniel Rosenberg**  
CHARLES RUSSELL SPEECHLYS  
London, United Kingdom



**Jasmine Kingsley**  
*Chief People and Legal Officer*  
HUDL  
Lincoln, Nebraska



**Ignacio López-Balcells**  
BUIGAS  
Barcelona, Spain

12:00 p.m.– 1:30 p.m.

**LUNCH BUFFET**

*Waterfall Lawn*

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**

*Frank Capra Ballroom*

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.

7:00 p.m. – 10:00 p.m.

**Game, Set, Match!**

**Cocktail Reception & Buffet Dinner**

*Tennis Complex*

Tonight's dinner we will go back in time to the mid-20th century when mod design and fashion came into vogue and tennis was all the rage. Join us for a reception followed by a buffet dinner at the Tennis Complex. Dance the night away on the tennis court that has hosted greats such as the Williams' sisters and Roger Federer. It's sure to be a grand slam!

*Suggested Attire:* Mid-century modern inspired. The Tennis Complex is an outdoor space, light layers are recommended.

10:00 p.m. – 12:00 a.m.

**After-Hours Hospitality Suite**

*Frank Capra Ballroom*

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 you won't want to miss!

Hospitality Suite Liaisons:



**Joe Fortner**  
HALLORAN SAGE  
Hartford, Connecticut



**Tim Peeples**  
DANIEL COKER  
Oxford, Mississippi

MARCH 4, 2023

7:30 a.m. – 9:30 a.m.

**BREAKFAST BUFFET**

*Waterfall Lawn*

Attendees: 7:30 a.m. – 8:30 a.m.

Spouses: 7:30 a.m. – 9:30 a.m.

7:30 a.m. - 8:30 a.m.

**CLIENT ROUNDTABLE BREAKFAST**

*Main Lawn*

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

8:30 a.m. – 9:15 a.m.

**ROUNDTABLE SESSIONS – ROUND 1**

Attendees choose one option from the list below.

ROUNDTABLE 1

**THE WORKPLACE IN THE ERA OF THE JETSONS: A LOOK AT HOW TECHNOLOGY HAS AND WILL CONTINUE TO CHANGE OUR LIVES**

The Jetsons, Dick Tracy, Blade Runner, Star Wars and numerous other fictional characters and stories forecast a picture in the 1960s and 70s of what our future world would look like with computers, robots, communication devices, holograms and other "whimsical" inventions. We are now seeing these fantasies of the past become our reality as smart phones, tablets, laptops and virtual meetings have become commonplace, if not necessary, in our personal and work lives. Given all the advancements we've seen in technology in the last 10-15 years, as well as the adjustments we all made to how we worked during the pandemic, everyone is wondering what other technology changes are on the horizon and how they will affect our personal and professional lives, and those of the next generation. This roundtable will take a brief look back and a long look forward as we discuss advances in technology that can/will assist people in where and how they perform their jobs, and what we think the workplace will look like in the next 10 to 15 to 25 years.



**Joel Hlavaty**  
Moderator  
FRANTZ WARD LLP  
Cleveland, Ohio



**Ashley Halfman**  
Vice President and General Counsel  
PRINTPACK  
Atlanta, Georgia



**Kim Metrick**  
Vice President, Employment Law,  
Legal Operations and Investigations  
WALGREEN CO.  
Deerfield, Illinois

ROUNDTABLE 2

**GET READY TO BE PLUGGED IN OR LEFT BEHIND—OPPORTUNITIES AND RISKS OF BEING AN EV-FRIENDLY BUSINESS**

The development of charging infrastructure for electric vehicles represents a key focus for governments and vehicle manufacturers and a profitable opportunity for fuel retailers and the hospitality and retail industry generally. Given the expanding role EVs are playing in government policy and legislation, they offer many incentives for building EV charging infrastructure. Retailers with charging stations gain visibility by appearing on EV charging maps, attracting electric car drivers who might otherwise bypass them. With their existing infrastructure and strategic locations, fuel and other retailers are taking advantage of the opportunity to attract customers including high-income customers who may take advantage of services such as food or beverage offerings and convenience shops during a charging break and fuel retailers can benefit from electricity prices' relative stability compared to the fluctuating gas prices. Consumers will increasingly locate charging-friendly locations via apps on their vehicles and phones and choose where they shop and stay during overnight travel based on the availability of charging stations. With the conversion of retail and hospitality properties to EV friendly venues come new risks. This panel of industry representatives and counsel will discuss the expected changes to premises and business models and the associated risks.



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



**Michael McCue**  
Director TPA  
Liability Claims  
ALBERTSONS COMPANIES  
Aurora, Illinois



**Jolene Wall**  
Deputy General  
Counsel—Compliance,  
Risk & Litigation  
REI  
Sumner, Washington



**Monica Garcia**  
BUTT THORNTON  
& BAEHR PC  
Albuquerque, New Mexico

ROUNDTABLE 3

**MOBILE APPLICATIONS, SOCIAL MEDIA ADVERTISING AND THE INTERNET OF THINGS: WHAT'S YOUR APP-ETITE FOR RISK**

For better or worse, in modern society more and more of social and business interaction is conducted through our cell phones. While we may cringe when looking at data about how many times we pick up and look at our phones each day, or how much time we spend on social media, as business people and legal professionals it is important to recognize how this digital interface drives business and the legal challenges it presents. In this roundtable presentation, we will focus on some of the legal issues that arise out of this aspect of business including, data privacy in the mobile application space, the risks and benefits of online word of mouth including critical legal disclosures and rules on topics like fake reviews, selectively posting positive reviews, and astroturfing with fake reviews from the company and other hot topics involving mobile applications and the law.



**Jake Lehman**  
Moderator  
GERMAN, GALLAGHER & MURTAGH, P.C.  
Philadelphia, Pennsylvania

ROUNDTABLE 4

**WELLNESS AND THE GREAT AWAKENING: IT'S NOT JUST A BUZZWORD ANYMORE**

"Wellness", like "pandemic" or "quarantine", is a term that has "Zoomed" to prominence in our post-COVID-19 world. While employers have always been aware that the workplace and its culture played a strong influence in employees' mental health, it took a global pandemic and resultant "pause" for many businesses to slow to a pace necessary to feel and see a crisis that has been highlighted by over two years of COVID-19 and its effects. How employers deal with this crisis will dictate how successful they are with keeping talent and fostering a healthy workplace environment into the future. Join our panelists in an interactive, roundtable discussion tackling some of the most pressing questions facing employers, like, what are organizations doing to recognize and address wellness concerns? What are some initiatives that seem to work, and others that miss the mark? How do you foster support from the top-down within your organization? These tough topics and more will be explored throughout our session.



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



**Reginald Paige**  
Associate General Counsel  
SYLVAMO NORTH AMERICA  
Denver, Colorado



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

ROUNDTABLE 5

**COMPLEX RESTRICTIVE COVENANT TOPICS FOR THE ADVANCED PRACTITIONER**

This session is not for the faint of heart. We skip the introductory material, assume you all know your way around a non-compete, and dive directly into the deep end. The session is for the advanced practitioner and will cover such futuristic and evolving topics as retaliation-based defenses to restrictive covenant litigation claims (including anti-SLAPP motions), micro-union organizing to prevent non-competes, harnessing fee-shifting statutes to enforce or defend against claims, application of the "janitor rule" and other scope of restriction arguments, bad faith attorneys' fee claims under trade secrets law and mandatory arbitration to avoid choice-of-law and choice-of-forum clauses.



**Joel Andersen**  
Moderator  
NILAN JOHNSON LEWIS PA  
Minneapolis, Minnesota



**Dean Robertson**  
Assistant VP & Senior Corporate Counsel  
VITAS HEALTHCARE  
Miami, Florida



**Annie Ricci Taylor**  
Associate General Counsel  
MARINER WEALTH ADVISORS  
Overland Park, Kansas

ROUNDTABLE 6

**THE IP RISKS OF CHANGE, AND HOW TO MINIMIZE THEM—LUCK FAVORS THE PREPARED**

The world is changing, with emerging new technologies and procedures cropping up everywhere, from use of NFT's to the surge in clean energy technologies. Whatever change is afoot for your company, intellectual property challenges will be part and parcel of what to expect. This presentation will address the world of IP due diligence – including trademarks, trade dress, copyrights, patents and trade secrets. We will discuss not only avenues to protect your changes, but also the necessary diligence efforts to assess and reduce risk.



**Scott Stimpson**  
Moderator  
SILLS CUMMIS & GROSS P.C.  
New York, New York



**Angela Wilson**  
Senior Counsel, Intellectual Property  
THE HERSHEY COMPANY  
Hershey, Pennsylvania



**Lois Duquette**  
MCNEES WALLACE & NURICK LLC  
Harrisburg, Pennsylvania

ROUNDTABLE 7

**KIDS/PEOPLE SAY THE DARNDDEST THINGS!**

This roundtable will discuss how to manage workplace security and productivity while also managing your message to the public in an age where people feel emboldened to say/tweet/post/do just about anything.



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



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



**Cate Jackson**  
GENTRY LOCKE  
Roanoke, Virginia

ROUNDTABLE 8

**THE WALLS COME TUMBLIN' DOWN: CROSS-BORDER AND OVERSEAS DISCOVERY IN INTERNATIONAL LITIGATION**

For better or worse, changes in technology and society have encouraged international litigation and opened doors, walls and borders to the pursuit of investigation and discovery that would have been out of reach just a few years ago. Still, while the means may exist that allow cross-border and cross-national discovery to proceed, not all jurisdictions and governments have "gotten on board." After reviewing what has become feasible in this rapidly changing arena, our panel will discuss how courts and governments have — or have not — adapted to allow for broader discovery (including depositions), offer suggestions on how to press for — and to rebuff — efforts to secure information in remote locales and provide pointers on one might work within the system to deal with existing barriers.



**Kandice Hull**  
Moderator  
MCNEES WALLACE & NURICK LLC  
Harrisburg, Pennsylvania



**John Compagno**  
General Counsel  
MEYER  
Vallejo, California



**Kim Campion**  
CHARLES RUSSELL SPEECHLYS  
Paris, France

ROUNDTABLE 9

**NOT IN THE PLAYBOOK: NAVIGATING SUPPLY CHAIN DISRUPTION AND MATERIAL PRICE VOLATILITY IN CONSTRUCTION—AN INTERNATIONAL VIEW**

While all segments of commerce have been adversely impacted, either directly or indirectly, by supply chain disruption, the construction industry in all corners of globe has been uniquely impacted by supply challenges. Whether by pandemic, inflation, war, protective tariffs or increased competition for a finite supply, scarcity of parts and materials and their price volatility have triggered project delays, and worse still, project cancellations. As a consequence, owners and developers, designers and constructors are dealing with an entire range of challenges with planning and executing construction projects. This panel will explore the causes of and reaction to the supply chain disruption, as well as ways in which the construction industry is rethinking and reformulating supply chain management.



**David Draper**  
Moderator  
LEWIS THOMASON  
Knoxville, Tennessee



**Christine McAnney**  
VP and General Counsel  
BALFOUR BEATTY  
Atlanta, Georgia



**Paula Boast**  
CHARLES RUSSELL SPEECHLYS  
Manama, Kingdom of Bahrain



**Pijan Wu**  
LCS & PARTNERS  
Taipei, Taiwan

9:15 a.m. – 9:35 a.m.

**BREAK**

10:20 a.m. – 10:40 a.m.

**BREAK**

9:35 a.m. – 10:20 a.m.

**ROUNDTABLE SESSIONS – ROUND 2**

Attendees choose one option from round 1.

10:40 a.m. – 10:55 a.m.

**What's Happening at ALFAI Headquarters?**

*Fiesta Ballroom 5-10*

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

## Identifying and Managing the Risks Associated with Global Electromobility

We are undergoing a transformation to an electro-mobile society with the number of both noncommercial Electric Vehicles (EVs) and light commercial electric vehicles increasing exponentially. The charging infrastructure necessary to support EVs represents a key focus for governments and vehicle manufacturers with billions of dollars being invested in new electric vehicle battery factories. This transition depends on a supply chain of materials including minerals such as lithium, nickel and cobalt that are used to manufacture EV batteries. The transformation to electromobility will not only impact multiple industries but create new and potential increased risks of liability. There is currently no standardized process to recycle lithium-based batteries and the long term environmental and health impacts of battery disposal are unknown at present. Software is expected to account for as much of 30% of an EV's makeup compared with around 10% within a car today. Increased connectivity is likely to give rise to cyber vulnerabilities, including the threat of malicious attacks, system outages, bugs and glitches. Overcharging of batteries or issues with power connection can spark fires resulting in residential or commercial property claims, a particular concern where multiple vehicles are charged in underground car parks such as office towers, airports and stadiums. Our panel will discuss these and other risks throughout the supply chain and those facing the manufacturers, installers, owners, insurers and users of charging stations.



**Tom Bazemore**  
*Moderator*  
HUIE, FERNAMBUQC & STEWART, LLP  
Birmingham, Alabama



**Reed Darsey**  
*Senior Staff Counsel*  
STELLANTIS  
Auburn Hills, Michigan



**Justin Evenson**  
*Senior Counsel*  
UBER  
San Francisco, California



**Jim Martin**  
*Vice President, Major Case Unit*  
GALLAGHER BASSETT  
Clinton, Iowa



**Annette Mijanovic**  
HAIGHT BROWN & BONESTEEL LLP  
Los Angeles, California

11:55 a.m. – 12:00 p.m.

## Closing Remarks



**Schaun Henry**  
*Program Chair, 2023 International Client Seminar*  
MCNEES WALLACE & NURICK LLC  
Harrisburg, Pennsylvania

12:00 p.m. – 1:30 p.m.  
LUNCH BUFFET

*Waterfall Lawn*

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

*Frank Capra Ballroom*

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 Wine Tasting

*Las Brisas Ballroom*

A unique opportunity to meet international (non-U.S.) attorneys and sample wines from around the world. 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.

## TO THE FUTURE!

### Cocktail Reception & Buffet Dinner

*La Casa Complex*

Close out this year's International Client Seminar with a farewell meal with friends both old and new. Until we meet again!

*Suggested Attire:* Futuristic-inspired – neon and metallic encouraged! La Casa is an outdoor space, light layers are recommended.

10:00 p.m. – 12:00 a.m.

## After-Hours Hospitality Suite

*Frank Capra Ballroom*

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.

Hospitality Suite Liaisons:



**Joel Hlavaty**  
FRANTZ WARD LLP  
Cleveland, Ohio



**Allen Sydnor**  
HUIE, FERNAMBUQC & STEWART, LLP  
Birmingham, Alabama

## FACULTY BIOS

**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.

**PAULA BOAST** is Head of Construction Engineering & Projects with ALFA International member firm Charles Russell Speechlys in Bahrain. She has lived and worked in the Middle East region since 2006 and specializes in construction projects, with a focus on Bahrain, Qatar, UAE, Kuwait, Oman, and Saudi Arabia. Her extensive experience includes real estate and development, regeneration, infrastructure and utilities, renewable energy, power and water, oil and gas, hotels, leisure and tourism, industrial and commercial, education and healthcare. She operates in both the private and public sectors acting on behalf of government and regulatory clients, including the Ministry of Works and Ministry of Finance, as well as project employers and developers, lenders and investors, contractors, subcontractors, consultants and specialized procurement and supply chain. Paula is a 360-degree projects lawyer who carries out both contentious and non-contentious work. She is an International FIDIC Contracts specialist. She assisted the Bahrain Ministry of Works in the drafting and publication to market of its first-ever Standard Suite of Construction Contracts (2009 Edition) based on FIDIC forms. Her work includes front-end project suite preparation and procurement for PPP and PFI projects, EPC, design and build as well as contract claims administration, advisory and dispute resolution. She is renowned for her work in the ADR arena, including being an accredited Mediator with the Bahrain Chamber for Dispute Resolution. She is extremely experienced in the Middle East local and multi-jurisdictional litigation and arbitrations, including UNCITRAL, ICC, DIFC, QFC, BCDR and LCIA.

**KIM CAMPION** leads Charles Russell Speechlys' Employment team, the ALFA International member firm in Paris. Kim advises companies on all aspects of French employment law relating to their French operations (whether on individual or collective matters), and in particular, in connection with restructurings or M&A. He advises mostly international companies or groups of companies on all aspects of French employment law relating to their French operations (whether on individual or collective matters), and in particular, in connection with restructurings or

M&A. Kim represents his clients in their in-court and out-of-court proceedings (litigation and settlement negotiations). He has recognised expertise concerning collective employment issues including negotiations with trade unions, works councils and staff representatives, definition and implementation of collective redundancies, and negotiation of collective agreements. He assists his clients in connection with their day-to-day human resources issues, such as recruitment, employment contracts and dismissals, staff representative elections or drafting of collective agreements.

**STEVEN J. COLOGNE** is from ALFA International's member firm in San Diego, Higgs Fletcher & Mack, LLP and has been the Firm's Managing Partner since 2017. He devotes his law practice to complex Tort and Commercial litigation in State and Federal Courts. In addition to his law practice, Mr. Cologne achieved the distinction of being certified as a Fellow in The Chartered Institute of Arbitrators (CI Arb) effective May 2020. On May 4, 2020, he was admitted to practice law in the District of Columbia. In December 2020, he was appointed a Panelist with the American Arbitration Association (AAA). As an arbitrator, Mr. Cologne focuses on complex commercial disputes, including in the areas of employment, construction and professional liability. His experience as managing partner of a law firm gives him a unique perspective as he is able to understand legal needs within a business context. He has received the highest rating (AV) available from Martindale-Hubbell for ethics and legal ability, and has been selected by his peers for inclusion in The Best Lawyers in America each year from 2008-2022. He has been named to the San Diego Super Lawyers® list since 2007. He has earned the rank of Advocate with the American Board of Trial Advocates (ABOTA), the premier association of trial attorneys, with nearly 65 jury trials to verdict. For his demonstrated leadership and vision, in 2017 The Daily Transcript named him as one of the "50 Influential Leaders" in San Diego. In 2020, Mr. Cologne was awarded the Distinguished Alumni Award by the University of San Diego School of Law. In his free time, he enjoys wilderness backpacking, horseback riding, outdoor photography, and foreign travel.

**JOHN M. COMPAGNO** serves as General Counsel/Senior Vice President at Meyer Corporation and its affiliates. Meyer is a global conglomerate and the innovator of the highest quality brands of cookware and bakeware in the world. Its products include Anolon, Circulon, KitchenAid, Farberware, Hestan, Bonjour, Ruffoni, Rachael Ray, Ayesha Curry, Anyday, LocknLock, etc. Mr. Compagno also acts as General Counsel for affiliates Blue Mountain Enterprises, an active real estate development, management and construction company based out of Vacaville, CA which is an active leader in designing and installing multi-family communities and assisted living complexes ([www.bluemountainenterprise.com](http://www.bluemountainenterprise.com)) and Hestan Commercial Company, an award winning culinary brand based out of Anaheim, CA renowned for creating the market's most advanced, powerful and versatile commercial kitchen equipment, premium outdoor grills and luxury indoor appliances ([www.hestan.com](http://www.hestan.com)).

hestan.com) Mr. Compagno was formerly an equity law partner and deputy practice leader at the San Francisco office of Holland & Knight, LLP where his practice focused on real estate, corporate and business law. Prior to his transactional practice, Mr. Compagno litigated numerous civil, business and construction litigation cases and obtained substantial trial and arbitration/mediation experience. Mr. Compagno also served as a criminal prosecutor in the Monterey County District Attorney's office in 1993-1994. Mr. Compagno has been recognized as one of America's Top 50 Lawyers for Business Law in California in 2022 and multiple times in Northern California Super Lawyer's magazine for Real Estate Law.

**BRETT M. COWELL** is a founding partner and the chairman of the Sydney and Adelaide, Australia ALFA International law firm of Cowell Clarke. He heads the Corporate practice group of Cowell Clarke. Mr. Cowell advises the firm's corporate and business clients on corporate transactions, takeovers, schemes of arrangement, mergers and acquisitions, securities market issues, capital raisings and equity funding. Many of the transactions Mr. Cowell advises on involve high value IP assets. In connection with these matters, he deals with investors, financiers and corporate advisors, underwriters, ASX and ASIC. He consults to Board chairs and CEOs on corporate issues, including strategic issues, governance and shareholder relations, including activist matters. Clients range from large publicly listed companies to smaller, fast growing entrepreneurial businesses. Mr. Cowell is also a non-executive director on a number of boards.

**DAVID DRAPER** is a long-time ALFA International Construction Practice Group and Steering Committee member, and the senior construction lawyer in the Knoxville, Tennessee office of ALFA International member firm, Lewis Thomason. He is an AV-rated lawyer with broad experience assisting clients with project related contract negotiations and construction related trial work in both court and arbitration. His practice is concentrated design professional liability defense, construction defect and construction related insurance coverage disputes. His clients include owners, designers, industrial, commercial, utility and residential general contractors, subcontractors and suppliers. He has mediated, arbitrated or tried claims involving design error, material and equipment defects, changed conditions, defective workmanship, construction site personal injury, payment disputes and delay. He also handles OSHA enforcement cases, having previously obtained an OSHA 10-hour certification. He is a Tennessee Supreme Rule 31 listed Civil Mediator. Away from work, he enjoys time with his wife, Sherry, playing guitar, fishing and spending time in the highlands of Southern Appalachia.

**LOIS DUQUETTE** is a member of the Intellectual Property Group, a team of attorneys and paralegals dedicated to helping clients of all sizes protect and grow their intellectual property, as well as the Corporate & Tax Group at McNees Wallace & Nurick, the ALFA International firm in Harrisburg, PA. Lois helps clients select and register new trademarks as well as protect and license trademark rights they already own, both in the US and internationally. She advises clients in the areas of copyrights, trade secrets, advertising,

promotions and a wide variety of intellectual property agreements and has extensive experience negotiating a wide variety of commercial contracts, including development, manufacturing, sourcing, advertising and software as a service agreements. Lois offers practical legal advice for protecting intellectual property and negotiating business contracts. She practiced for many years in-house at The Hershey Company where her responsibilities included management of Hershey's global IP portfolio. Lois helps both large and small businesses develop and implement cost-effective intellectual property strategies that utilize trademarks, copyrights, patents, trade secrets, licensing, and litigation, to grow and protect the client's business locally, nationally or worldwide, as appropriate for the client. When enforcement is necessary, Lois is an experienced litigator who has successfully represented clients in federal court and before the Trademark Trial and Appeal Board of the USPTO. In addition to her intellectual property practice, Lois helps clients negotiate a wide variety of agreements that support successful long term business relationships. Lois also has deep experience in the food industry and advises clients on issues related to the food industry such as recalls, advertising claims, and development, manufacturing and sourcing agreements.

**JUSTIN EVENSON** serves as Senior Counsel with Uber Technologies, Inc., and has oversight of Safety and Insurance Volume Litigation for the Western United States. Justin's team focuses on Uber Rides litigation, with an emphasis on claims from riders and third parties. Having led the safety and insurance litigation strategy for Uber after the passage of Proposition 22 in California, Justin's core focus is minimizing exposure for the company while furthering business goals. Justin is actively involved in multiple initiatives at Uber, including supporting the Diversity and Inclusion Task Force, providing oversight to the onboarding of defense counsel on a national level and actively representing Uber at legal seminars, conferences and educational events. Prior to joining Uber, Justin practiced insurance defense for various firms in San Diego, California. Justin earned his BA in Political Science from the University of California, Santa Barbara, and his JD from California Western School of Law.

**EMILY SANFORD FISHER** is General Counsel, Corporate Secretary, and Senior Vice President, Clean Energy for the Edison Electric Institute (EEI) in Washington, D.C. Emily is responsible for managing EEI's litigation and legal affairs, covering a wide range of energy and environment regulatory and policy issues, at the state and federal level. She also oversees and coordinates strategic clean energy engagement across EEI and the federal government. EEI's Office of the General Counsel and Environment Department report to her. Emily received a B.A. in international affairs with a concentration in economics from the George Washington University and a J.D. from Georgetown University Law Center, where she was the Administrative Editor of The Georgetown Environmental Law Review. She is a past Co-Chair of the American Bar Association's Committee on Climate Change, Sustainable Development and Ecosystems. Emily serves on the Keystone Energy Board and was appointed to the Energy Systems Integration

Group's Advisory Council in 2019. Emily lives in Washington, D.C. with her husband and son. A proud Washingtonian, she serves on the Board of CityYearDC, a national service program that brings educational support to D.C. public schools.

**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 the chair emeritus of ALFA International's Business Litigation Practice Group, and chaired its 2017 Seminar. 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. Among the market segments in which he works are financial services, chemical processing, construction, information technology, marketing, firearms, music, and other manufacturing and services industries. 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, antitrust issues and e-commerce, including authoring the Connecticut portions of several ALFAI compendiums regarding trade secrets. He 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 blues, jazz and country guitar skills, and performs with his wife (also an attorney) in their vocal and guitar duo, "Blind Date."

**MONICA R. GARCIA** is a Shareholder 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 25-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.

**ASHLEY A. HALFMAN** is a graduate of the University of Georgia School of Law, where she was an editor of the Georgia Law Review and recipient of the Woodruff full-tuition law scholarship. She began her practice at Jones Day in Washington, DC, where she worked in the transactional practice group for five years. She then moved to Atlanta, where she became a partner at Miller & Martin, specializing in mergers and acquisitions and general corporate law. She is currently Vice President and General Counsel at Printpack, a global food and medical packaging company headquartered in Atlanta, Georgia. Ashley has been named to Georgia Trend Magazine's Legal Elite list three times. In her free time, she enjoys providing legal services to those in need through the Pro Bono Partnership of Atlanta. She and her husband also enjoy travel, wine, live music, and college football.

**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.

**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 McNeese, 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 Roanoke, 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.

**JOE KANG** serves as Assistant General Counsel at KONE. Joe leads the Legal Operations practice group within the KONE Law department responsible for providing advice to all business functions and senior management regarding general corporate matters, regulatory compliance, commercial agreements, data protection, IP protection, risk management as well as mergers and acquisitions. During his tenure at KONE, Joe has been the lead on numerous continuous improvement projects in an ongoing effort to improve KONE's products, services, or processes. Joe is a 1984 graduate of Grinnell College in Iowa and obtained his law degree from DePaul University in Chicago. KONE is a global leader in the elevator and escalator industry, providing elevators, escalators and automatic building doors, as well as solutions for maintenance and modernization to add value to buildings throughout their life cycle. Through more effective People Flow®, we make people's journeys safe, convenient and reliable, in taller, smarter buildings.

**BARBARA KELLEY** began her career in the housing industry in 2002. In her current role as Associate General Counsel at Clayton she manages labor and employment matters. Clayton Homes is the nation's second largest home builder and the leading manufacturer, retailer and lender in the manufactured housing industry. Clayton employs over 22,000 team members in 40 home building facilities, 20 supply divisions and 323 subdivisions. Barbara is a graduate of Cumberland School of Law and University of Maine.

**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.

**CHRISTIN KRÄMER** is partner of ALFA International member firm, Tiefenbacher, in Heidelberg, Germany. She is co-heading Tiefenbacher's International Division and 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. In January 2019, she obtained the distinction of being a Certified Specialist in Commercial and Corporate Law. She is therefore well experienced not only in transactional law but in all ramifications of corporate law, such as disputes between shareholders, litigation, directors' and officers' liability. Since October 2020 Christin is the a member of the ALFA Future Leader Forum and liaison to the International Law Practice Group.

**CHERISE LATORTUE** is Associate General Counsel with Flynn Restaurant Group. Originally from Trinidad and Tobago, Cherise lived in New York City, developing a career in real estate for several years before she decided to shift gears and attend law school in Southern California. Since graduating from law school over 10

years ago, Cherise has focused her practice on defense litigation, particularly complex litigation and labor and employment. She continued her focus on defense litigation, counseling, and advice in the employment world when she moved in-house to Flynn Restaurant Group, the nation's premier and largest franchisee restaurant group which operates 2,000+ restaurants across 44 states. As the company's Associate General Counsel, Employment, Cherise handles Flynn's employment litigation and provides advice and counsel to internal business partners across various departments including Benefits, Workers' Compensation, Garnishment, and Compliance. Cherise is an attorney, boy-mom, pet owner, and family arts, science, & craft coordinator.

**RICHARD A. LATTA**, is a partner in the ALFA International member law firm, 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.

**IGNACIO LOPEZ-BALCELLS** is founder and partner of the ALFA International Spanish member firm, Buigas. 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.

**JIM MARTIN** leads the Transportation Major Case Unit at Gallagher Bassett. As a Senior Property and Casualty Insurance Executive, Jim is experienced in the development and implementation of strategic vision across numerous national and international claims portfolios. He has managed multi-jurisdictional litigation involving cases valued up to \$500 million in the areas of commercial and personal lines property, casualty and specialty lines. Mr. Martin's expertise is at capitalizing on opportunities to maximize performance, while leading cross-functional teams to ensure the achievement of key objectives. A graduate of Ohio University and the University of

Akron School of Law, Mr. Martin is a licensed attorney who has been admitted to practice before the U.S. Supreme Court.

**KATE MARTZ** is a partner with Baylor Evnen, LLP, the ALFA International member firm in Lincoln, Nebraska. She is a member of the firm's litigation practice group and handles complex litigated matters involving the transportation industry, premises liability, employment litigation, and professional liability. Kate has successfully tried cases in Iowa and Nebraska and handled appeals in the Eighth Circuit Court of Appeals. Kate strives to simplify difficult issues and provide practical advice throughout litigation to best achieve her clients' goals. Kate is a member of ALFA's Future Leaders Forum, Transportation steering committee, Women's Initiative steering committee and the Diversity and Inclusion Leaders Forum. Kate is a leader and firm representative in initiatives supporting diversity and inclusion in the legal field. She was also recently presented with the Rising Star award from the Nebraska Defense Counsel Association.

**BYRONA J. MAULE** is a shareholder of Phillips Murrah P.C., the ALFA International member firm in Oklahoma City, Oklahoma, where she serves as the senior member of the firm's Labor and Employment Law Group. Byrona's practice focuses on advising and representing corporations in all areas of labor and employment law transactions and litigation, such as employment contracts, independent contractor agreements, policies and procedures, unemployment, EEOC/state human rights charges, OSHA violations and retaliatory discharge, NLRB unfair labor practice claims, federal and state wage and hour compliance and employment law litigation before state and federal courts. Previously, Byrona spent five years as corporate counsel for a healthcare facility, giving her a unique insight into her client's diverse labor and employment law needs. From 2009 to 2015, she served as a commissioner on the Oklahoma Merit Protection Commission, the entity responsible for providing an employment dispute resolution system for Oklahoma state employees. In addition, she frequently conducts employment law training for businesses and governmental entities. Byrona graduated Order of the Barristers from the University of Missouri – Columbia School of Law in 1986.

**CHRISTINE MCANNEY** is an expert in construction law, including the negotiation, mediation and arbitration of large and complex construction-related legal matters and currently leads all these critical responsibilities for Balfour Beatty's US Civils business. Before joining Balfour Beatty, she was the head of Venable's Construction Law Group, based out of Venable's Northern Virginia office. Christine obtained her Bachelor of Science degree from the University of Central Florida and is a graduate of the George Mason University School of Law. She holds multiple bar admissions, is a panel member of the American Arbitration Association and is a Fellow of the American College of Construction Lawyers.

**MICHAEL J. MCCUE** is the Corporate Director TPA Liability Claims for Albertsons Companies, Inc., a national retail grocer headquartered in Boise, Idaho. Prior to Albertsons, he was the

Corporate Director Casualty Claims for Safeway, Inc. He currently has oversight responsibility in the adjustment of all personal injury, property damage, professional liability and product liability claims handled by the company's TPA. Michael has over 40 years of commercial insurance experience with a record of progressive responsibility in claims management. His background includes the handling and resolution of Auto Liability, General Liability, Product Liability, Professional Liability, Property and Worker's Compensation claims. He served on the Employers' Coalition for Illinois Worker's Compensation Reform, suggesting and evaluating the bill's provisions, and in his commercial insurance career, he was a team leader in the design, development and implementation of a litigation management process adopted company wide.

**ANNETTE MIJANOVIC** is a partner at the ALFA International member firm Haight Brown & Bonesteel LLP, in Los Angeles, California, where she began her career as a summer associate fifteen years ago. She chairs the firm's Business Solutions practice group. She is a member of the firm's Transportation, Business Solutions, and Products Liability practice groups. She has served as lead counsel in trials involving transportation and commercial litigation disputes in state and federal court. She is a member of the firm's Immediate Response Team for transportation accidents. She is admitted to practice law in all California state, federal, and tribal courts.

**KIM METRICK** is Vice President, Employment Law, Legal Operations and Investigations for the Walgreens Boots Alliance. Kim has held various leadership positions throughout her career with Walgreens. In her current role, Kim is responsible for leading a team of employment law and employee benefit attorneys and legal staff engaged in a broad based national employment and accessibility law practice. Kim also oversees the Legal Operations team at Walgreens. Prior to joining Walgreens, Kim was an associate with the law firm of Ross and Hardies in Chicago, IL. Kim holds a bachelor's degree in Political Science from the University of Michigan, Ann Arbor, and a Juris Doctorate degree from Chicago-Kent College of Law. Kim serves on the University of Michigan, Political Science Advisory Board and the Posse Foundation Chicago Advisory Board. Kim is passionate about advancing diversity, equity and inclusion and was awarded the 2021 Woman of Achievement Award by the Anti-Defamation League for her efforts to advance diversity within the legal community.

**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.

**JOHN OSGATHORPE** is a managing partner and shareholder with Taylor Day, the ALFA International member firm in Jacksonville, Florida. In his practice, John protects the interests of companies,

management teams, and business owners in a diverse array of commercial and torts disputes in Florida. His broad experience includes representing companies in contract disputes, corporate control/fiduciary litigation, business torts, and real property disputes, as well as the defense of retailers, manufacturers, and trucking companies in significant injury claims. He is a member of the Florida Bar and Illinois Bar (inactive). John graduated from Indiana University (Economics) and Indiana University School of Law-Indianapolis. He served as an Associate Editor for the Indiana International and Comparative Law Review and studied law at East China University of Political Science in Shanghai and Temple University's School of Law-Tokyo. John is active in both ALFAI's Business Litigation Practice Group (including as Chair for the 2021 Seminar) and Products Liability Practice Group. He previously served as ALFAI's Treasurer and on ALFAI's Board of Directors, as well as continues to serve on various ALFA committees.

**REGINALD R. PAIGE, SR. (REG)** is the associate general counsel of Sylvamo North America, formerly the global printing papers business of International Paper. Reg leads a team that is responsible for providing legal and business advice covering a wide range of areas; including but not limited to, commercial, information technology, manufacturing, global sourcing, supply chain, environmental health & safety, intellectual property, sales/marketing & branding, litigation, and real estate. Prior to joining Sylvamo, Reg served for more than twenty years as a business and legal leader in a privately held paper company (Evergreen) and a fortune 50 aerospace and technology company (United Technologies). Reg started his legal career in private practice at White & Case and Robinson & Cole in New York City and Connecticut, respectively. Reg serves on the boards of Loomis Chaffee School and Arts Memphis. He previously served on the boards of Pomfret School, New Britain Museum of American Art, Christ Church Cathedral, and the United Way Connecticut. Reg has a bachelor's degree from Johns Hopkins University. He is a Thomas J. Watson Fellow, completing his research in France and West Africa. He completed the UTC executive program at University of Virginia Darden School of Business and earned his Juris Doctor from New York University School of Law.

**LARRY PARSONS** currently holds the position of Chief Administrative Officer of McLane Company, Inc., a \$48 billion company providing grocery, foodservice and alcoholic beverage supply chain solutions for thousands of convenience stores, mass merchants, drug stores and restaurants throughout the United States. Larry is responsible for all Legal, Corporate Governance, Marketing & Communications, Safety, Food Safety, Security, Aviation, Insurance, Claims, Worker's Compensation and Sustainability matters for McLane. Headquartered in Temple, Texas McLane has over 23,000 employees and operates distribution centers in over 70 cities across the United States. Since 2003, McLane has operated as a wholly owned subsidiary of Berkshire Hathaway, Inc. Prior to joining McLane, Larry was the Vice President, Legal and Chief Ethics and Compliance Officer for Freescale Semiconductor, Inc. Prior to its merger with NXP Semiconductor N.V. in 2015, Freescale was a public company headquartered in Austin, Texas with over 24,000 employees in 26

countries. Before joining Freescale, Larry was Senior Director, Labor and Employment Law for Motorola, Inc. Prior to his role at Motorola, Larry practiced labor and employment law in the Austin office of Fullbright & Jaworski, L.L.P. and in the Dallas office of Jones Day, L.L.P. Larry received his B.S. from Texas Christian University (cum laude, University Honors and Departmental Honors) and his J.D. from Vanderbilt University School of Law (Order of the Coif, Law Review). Following law school, he clerked for the Hon. Jerre S. Williams, Circuit Judge, United States Court of Appeals for the Fifth Circuit. Larry is a member of the Association of Corporate Counsel (Past Chair, Council of Committees and Compliance and Ethics Committee), the Society of Corporate Compliance and Ethics, the Texas General Counsel Forum and is a Certified Compliance and Ethics Professional. He is a regular speaker on legal, compliance and ethics topics at events sponsored by ACC, SCCE, the Practising Law Institute and others. Larry currently serves on the Board of Visitors for the John V. Roach Honors College at TCU (Past Chair) and is a member of the Board of Directors of the YMCA of the Rockies (Vice Chairperson, Executive Committee, Governance Committee Chair, Investment Subcommittee Chair, Finance Committee,). He also is a member of Advisory Boards for FM Global and ALFA International, and serves on the Litigation Center Board for the American Trucking Association and the NPTC Institute Board of Governors. He has previously served on the Board of Directors for Marywood Child and Family Services, the Austin Theater Alliance, Volunteer Legal Services of Central Texas, Chorus Austin, and the Austin Summer Musical for Children.

**DEAN ROBERTSON** is an Assistant VP & Senior Corporate Counsel at VITAS Healthcare, the nation's largest hospice healthcare provider, with operations in 15 states and the District of Columbia. He has been with the company 17 years and has practiced law for more than 20 years. A large portion of his job involves overseeing and managing the company's litigation. Mr. Robertson provides general legal advice and assistance on a wide range of matters involving: commercial disputes, professional liability matters, employment litigation, including wage and hour class action litigation; responding to EEOC charges; overseeing internal investigations of discrimination, harassment, and whistleblower claims; providing advice and counsel on a wide variety of employment related issues, including day-to-day advice to management and human resources professionals. He is also responsible for overseeing investigations by governmental agencies, pre-litigation handling of disputed matters, third-party discovery requests and the many other legal issues arising out of the company's operations. Prior to joining VITAS, Mr. Robertson practiced law at a national law firm gaining substantial experience in litigation and alternative dispute resolution of multi-million dollar claims arising from commercial disputes, insurance, medical malpractice, employment and class action litigation. Mr. Robertson is a former board member and president of the Association of Corporate Counsel South Florida Chapter. He currently sits on the Legal Assisting Program Advisory Board for Broward College and is Vice Chancellor for the Episcopal Diocese of Southeast Florida.

**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 2022. He is also the Chair of the ABA Technology in M&A Subcommittee. 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.

**SCOTT RUSERT** is a shareholder of ALFA International member firm, Nilan Johnson Lewis PA, in Minneapolis, Minnesota. He is a board-certified civil trial specialist who has handled cases as lead counsel in state and federal courts in 34 different states. Scott has served as national product liability counsel to two different Minnesota-based Fortune 500 manufacturers and is currently national coordinating counsel on asbestos cases for a subsidiary of an Illinois-based Fortune 200 company. Scott is the Chair of the Minnesota Civil Trial Specialist Certification Board, past chair of the Civil Litigation Section of the Minnesota State Bar Association, and a Qualified Neutral under Rule 114 of the Minnesota General Rules of Practice for both mediations and arbitrations.

**HANNAH SCHMIDT** is a Lead Attorney for Ameritas Life Insurance Corp., a national life insurance company based in Lincoln, Nebraska. At Ameritas, she primarily provides advice and counsel on employment law matters, including internal investigations and employee discipline, EEOC and related administrative charges, employment litigation, employee benefits, and protected leaves. She started her career at Ameritas right out of law school and has been there for seven years.

**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 doctorate 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 various areas for a fulfilled, self-determined life in old age.

**CURT STAMBAUGH** is Assistant General Counsel for Energy Transfer Partners, and manages legal on major capital projects, including pipelines, processing and terminal facilities. Prior to the merger of Energy Transfer Partners and Sunoco Logistics, Curt was Assistant General Counsel for Sunoco Logistics where he also managed legal on major capital projects. Prior to his work inhouse, Curt was a partner at McNees Wallace & Nurick, LLC, the Harrisburg, Pennsylvania ALFA member, where he was the Chair of the Oil and Gas Group. Curt has managed legal on over \$8 billion in capital projects.

**SCOTT D. STIMPSON** is Chair of the Intellectual Property Practice Group and is resident with the ALFA International member firm Sills Cummis & Gross, in the firm's New York Office. Mr. Stimpson has practiced intellectual property litigation and counseling for 30 years, involving a wide range of IP issues including patents, trademarks, copyrights and trade secrets. He has significant trial (jury and nonjury), arbitration and mediation experience. He has successfully litigated many patent infringement and other technology cases, serving as lead litigation counsel in numerous matters. Mr. Stimpson's litigation experience has involved technologies such as LEDs, medical and other mechanical devices, semiconductors, cameras, cell phones, flash memories, chemical compositions, biotechnology and computer science. Mr. Stimpson's licensing and counseling work has similarly involved a wide range of technical disciplines and clients. Mr. Stimpson also has significant experience in general commercial litigation, including causes of action such as a breach of contract, unjust enrichment, and other state and federal claims. He is a Registered Patent Attorney. Apart from his experience representing American clients, Mr. Stimpson has also served as lead counsel for clients in Japan, China and Korea. Mr. Stimpson has lectured on American patent litigation, giving presentations in the United States, Asia and Australia. Prior to joining Sills Cummis & Gross, Mr. Stimpson was an equity partner in Morgan Lewis & Bockius' Litigation and Intellectual Property Practices where he was lead counsel in numerous litigations and had considerable jury and non-jury trial experience. Prior to that, he was an equity partner at Pennie & Edmonds where he chaired the Mechanical Technologies Group.

**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.

**BRENDAN TAYLOR** is a partner in the Perth, Australia office of the national firm Mills Oakley. Brendan is a commercial litigator who works predominantly in construction, mining, media and corporate disputes. He appears as counsel in both state and federal courts

of Australia, performing interlocutory and trial work. Brendan also advises on, and appears in, arbitration matters involving domestic and international parties. In the course of his practice, he acts for a number of Australian and international companies. Brendan is a former member of ALFA International's Board of Directors. He has also been the Arbitrator for the Western Australian Football League for many years and the past Chairman of the Appeals Board of the Western Australian Cricket Association. He earned his Bachelor of Laws from the University of Western Australia. When not practicing law, Brendan played district cricket in Western Australia and Australian Rules football and in recent years (arising from his travels to ALFA events in the US) has become an enthusiastic NFL fan.

**KATHYS TERRY** is a director with Phillips Murrah P.C., the ALFA International member firm in Oklahoma City, OK. Her practice focuses on labor and employment for management, insurance coverage, and bet-the-company litigation and crisis management. Her 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. Another 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.

**JOLENE WALL** is Deputy General Counsel at REI, a national retail cooperative providing quality outdoor gear and apparel. Jolene supports the organization by providing legal review and advice in all aspects of the company's business. Responsibilities include providing legal support to the Human Resources and Merchandising Departments and the Coop Brands Division of the company, which designs, develops, and sources REI-branded gear and apparel. She also facilitates the company's Enterprise Risk Management program and oversees corporate compliance programs including the Code of Conduct, Records Management, Trade Compliance, Product Regulatory Compliance and Employment Practices as well as provides support to the Board of Directors and oversees the Litigation function of the department. Jolene joined REI in June 2007 from RadioShack Corporation, where she served as in-house counsel and Senior Director of Ethics and Compliance. As a corporate attorney at RadioShack, her primary areas of responsibility included advertising and marketing, product safety and compliance, supply chain management, and privacy matters. In her ethics and compliance role, Jolene was responsible for developing, implementing, and monitoring an enterprise-wide ethics and compliance program. She received her Bachelor of Arts degree in Political Science from Washington State University

and her Juris Doctorate from Texas A&M University School of Law. She is licensed to practice in Washington and Texas.

**ANDRE WEBB** is a partner with ALFA International member firm German, Gallagher & Murtagh in Philadelphia, Pennsylvania. He is an experienced trial attorney with a demonstrated history of success. Andre concentrates his practice on the defense of insured and self-insured entities in a variety of litigation matters, including premises liability, dram shop/liquor liability cases, motor vehicle accidents (inclusive of UM/UIM claims), and professional liability matters. The diverse nature of Andre's practice, along with his background and expertise, provides him with a unique perspective when advising and counseling clients towards attaining the best and most cost-effective resolution. Andre's professional activities extend beyond the courtroom as he is very active in the legal community. Andre was listed as one of 2023 Best Lawyers: Ones to Watch in America, named one of Pennsylvania Legal Award's "2021 Lawyers on the Fast Track" by The Legal Intelligencer, and recognized as a Pennsylvania Super Lawyer "Rising Star." Andre is an elected member of the Philadelphia Bar Association's Board of Governors; he served as Chair of the Executive Committee of the Young Lawyers Division ("YLD") and is an Executive Committee member of the Philadelphia Association of Defense Counsel ("PADC"). Andre is also active with the Pennsylvania Bar Association, where he serves in the House of Delegates.

**MARK F. WERLE** is a shareholder and director of Ryan Smith & Carbine, Ltd., ALFA International's Vermont member firm. His diverse experience includes protecting the rights of business owners in all manner of tort and contractual disputes. Mark's litigation practice includes intellectual property litigation, business torts, the representation of institutional lenders and other businesses in the workout of troubled debt and asset recovery, and the representation of parties in shareholder disputes. He is also active in environmental and real estate litigation as well as matters involving catastrophic transportation losses. Mark assists resorts and hotels in areas as varied as risk management, ADA compliance, television and movie production contracts, employment claims, construction defects and premises liability suits. Mark has tried cases in Vermont and New York; and he has successfully argued appeals to the Vermont Supreme Court and the United States Second Circuit Court of Appeals in New York.

**RYAN WIESNER** is Senior Counsel & Director of Insured Litigation with BrandSafway. In that role, Ryan manages BrandSafway's liability litigation portfolio across 30 countries with a focus on catastrophic personal injury and wrongful death claims arising from construction and product defects and insurance coverage matters. Ryan also serves as the legal representative for BrandSafway's Environmental, Health, and Safety team and engineering/product teams on compliance & risk issues. Prior to joining BrandSafway, Ryan was a

shareholder at a Milwaukee-based law firm defending similar claims nationwide. Ryan graduated from the University of Wisconsin-Whitewater (B.S., 2008) and Marquette University Law School (2012).

**ANGELA WILSON** joined Hershey in May 2021. She is the lead Intellectual Property lawyer at The Hershey Company. In this role, Angela leads the IP paralegal team and is responsible for developing and overseeing Hershey's global brand protection and enforcement strategy for the company's iconic brands, including Hershey's, Reese's, Twizzlers, and Jolly Rancher, as well as managing the patent portfolio. She also serves as a key business partner to Hershey's Global Licensing business, which boasts a food licensing program that is ranked #1 in the world. Angela is also the lead commercial lawyer for Hershey's retail business, Hershey's Chocolate World. Before joining Hershey, Angela was assistant general counsel for Hallmark where she advised on trademark and licensing issues for Hallmark's licensing business, as well as its subsidiaries, Hallmark Media (formerly Crown Media) and Crayola. Prior to joining Hallmark, Angela was senior counsel at GlaxoSmithKline where she managed the oncology trademark portfolio and led the anti-counterfeiting enforcement strategy for the Americas. Angela is a member of the International Trademark Association (INTA) and has served on the Enforcement and Anti-Counterfeiting Committees. She is currently a member of the Inhouse Practitioner's Committee where she co-chairs the Development of Inhouse Counsel Professionals subcommittee. Angela volunteers her time mentoring diverse students, including law school interns participating in the Hershey's Dinisa H. Folmar Internship Program.

**DR. PIJAN WU** is a senior counsel at LCS & Partners, the ALFA International member firm in Taipei, Taiwan, and an adjunct associate professor at Soochow University Law School. He practices and teaches mainly in the following areas: (1) international trade and investment, including transactions and research projects. He has written thesis and articles on the bilateral, regional and multilateral trade/investment issues. (2) Arbitration: He has worked on both commercial and investment arbitration. Especially for investor-state arbitration, he regularly advises and train government agencies on the implication and enforcement of BIT/FTA containing such mechanism. (3) M&A: While LCS is constantly ranked as top-tier M&A firm in Taiwan, Pijan has also been recognized as the leading lawyer in this area for many times. He is especially active in cross-border M&A involving TMT businesses. (4) Energy: LCS is one of very few law firms in Taiwan which has a prolific energy law practice. Pijan has been the outside legal counsel of Taiwan's Bureau of Energy, advising on energy law and policies. Pijan received his LLB and EMBA from National Taiwan University, LLM from Soochow University and JSD from New York University. He is admitted in New York State bar and is currently a Fellow in Chartered Institute of Arbitrators.

## GENERAL INFORMATION

### MEETING LOCATION

La Quinta Resort & Club  
49-499 Eisenhower Drive  
La Quinta, CA 92253  
Tel: (760) 564-4111  
[www.laquintaresort.com](http://www.laquintaresort.com)

### REGISTRATION

Please contact ALFA International Headquarters to register.

ATTENDANCE IS OPEN ONLY TO MEMBERS OF ALFA INTERNATIONAL AND THEIR INVITED GUESTS 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.

### SPECIAL ACCOMMODATION

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

### CLE CREDIT

ALFA International is an approved CLE provider in Illinois, California & Pennsylvania and certifies this program has been approved for 5.5 hours of CLE including 1 hour of Ethics for Group 1, Breakout 1 on Friday 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.

### SAFE RETURN TO LIVE MEETINGS PROTOCOL

The health and safety of all attending ALFA International clients, member attorneys, guests, vendors and staff are of the utmost importance to ALFA International. Please review the [Safe Return to Live Meetings Policy](#) on the ALFA International website for current protocols in place for live meeting attendance. Please note, this policy may change as CDC guidelines are updated so, please check back as the program approaches.

### SEMINAR CONTACT

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