

BRUCE F. DEAL

Senior Advisor

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Mr. Deal leads the economic consulting practice in the Menlo Park, CA office of Analysis Group. He has over 25 years of experience in economic, litigation, and management consulting. He has led hundreds of projects requiring complex economic analysis of publicly available and internal client information.

He has served as an expert witness in dozens of litigation and regulatory matters, and has been retained as a neutral expert in a complex mediation. His work as an expert has covered a variety of practice areas, including antitrust, finance and securities litigation, damages, and business valuation. Mr. Deal's industry experience has included health care, insurance, technology, telecommunications, and many others.

Prior to joining Analysis Group, Mr. Deal spent several years as a senior consultant and manager with Arthur Andersen. In this position, he provided financial and management consulting services to hospitals, physicians, and other clients, in such areas as operational organization and efficiency, merger and consolidation strategies, current and projected financial performance, and overall strategic planning.

Mr. Deal has taught economics and analytic methods to graduate students at Harvard University and published articles on economics-related topics. He has also consulted on national economic policy issues to the government of Indonesia through the Harvard Institute for International Development.

He coauthored a major report, *The Economic Effects of Federal Participation in Terrorism Risk* with R. Glenn Hubbard, an Analysis Group affiliate and former chair of the President's Council of Economic Advisers. In addition, he also coauthored a study, *Economic Impact Analysis: Proposition 71 California Stem Cell Research and Cures Initiative* with Laurence Baker, an Analysis Group affiliate and Stanford University School of Medicine faculty member, with whom he published an updated interim economic report on California's stem cell initiative. Mr. Deal is also the coauthor of a chapter on the use of econometrics in antitrust litigation for a recent American Bar Association publication.

EDUCATION

1994–97	Ph.D. coursework completed, Public Policy, Graduate School of Arts and Sciences, Harvard University, Cambridge, MA
1990	M.P.P., Public Policy, Kennedy School of Government, Harvard University, Cambridge, MA
1987	B.A., <i>Summa cum Laude</i> , Economics and Global Studies (double major), Pacific Lutheran University, Tacoma, WA

SUMMARY OF PROJECTS BY TOPIC

Insurance (Health Insurance Included in Health Care Section)

- *Confidential Universal Life Litigation*
Consulting expert on economic issues in a large cost of insurance (COI) charges litigation.
- *Mayumac v. Met Life*
Testifying expert on economic damages in a disability insurance matter.
- *Various Military Housing Projects v. Ambac*
Testifying expert on economic, insurance, and financial issues surrounding the use of credit enhancements and financial performance for large military housing projects.
- *Credit Disability Insurance*
Analysis of financial issues in a case alleging improper disclosure of changes in premium levels.
- *Life Insurance Consulting*
Valuation and analysis of a portfolio of large life insurance policies.
- *Long Trust v. Morgan Stanley*
Analysis of financial issues and damages resulting from alternative policy restructuring options for second-to-die estate planning life insurance policies.
- *Insurance Tax Litigation*
Consulting expert in a confidential tax litigation involving the tax treatment of certain insurance premiums.
- *Confidential Auto Insurance Litigation*
Analysis of issues relative to claims handling practices of a large auto insurance company.
- *Confidential Life Insurance Litigation*
Analysis of damages resulting from alternative portfolios of investments and second-to-die life insurance policies.
- *Confidential Insurance Litigation*
Analysis of damages resulting from lost commissions in an insurance broker insurance litigation.
- *Katz v. Mass Mutual*
Analysis of potential damages in a disability insurance litigation.
- *Confidential Insurance Litigation*
Expert on insurance valuation and general damages issues in a dispute involving non-traditional life insurance.
- *Markocki v. Olde Republic Title Insurance*
Expert on class certification issues in a class action regarding charges for title insurance.
- *Campbell v. Metropolitan Life*
Expert on damages calculation in a disability insurance dispute.

- *Cox v. Allstate*
Expert on statistical sampling in the class certification phase of a class action alleging improper homeowners' insurance claims handling by Allstate.
- *Confidential Title Insurance Matter*
Consulting effort on class certification matters in a large multi-state class action.
- *Estate Planning Life Insurance Matter*
Consulting expert analyzing issues associated with the economic performance of a portfolio of large estate planning life insurance policies.
- *Confidential Homeowners' Insurance Matter*
Consulting expert analyzing issues associated with the use of various data sources to obtain replacement values.
- *Confidential Indemnity Insurance Investigation*
Consulting expert analyzing issues associated with the deterioration of a set of financial products insured by an indemnity insurer.
- *Confidential Auto Insurance Investigation*
Consulting expert analyzing various aspects of auto insurance claims issues.
- *Confidential Life Insurance Litigation*
Consulting expert valuing life insurance policies and other damages issues.
- *Confidential Life Insurance Litigation*
Consulting expert valuing life insurance policies and other damages issues.
- *Hausman v. Union Bank*
Testifying damages expert valuing life insurance policies and other damages issues. Expert report provided.
- *Perez v. First American Title Insurance Company*
Testifying expert evaluating class certification issues relating the use of electronic data in identifying class members.
- *Windham v. Cook Life Insurance Litigation*
Testifying expert valuing policy performance of a variable universal life insurance contract used in a tax planning program. Expert report and trial testimony provided.
- *Confidential Class Action Litigation*
Consulting expert analyzing statistical issues associated with the use of a software package used to assist in evaluating bodily injury claims.
- *Confidential Class Action Litigation*
Consulting expert analyzing statistical issues associated with diminished value claims in auto insurance.
- *Pavlov, et al. v. CNA*
Testifying expert analyzing class certification issues associated with long-term care insurance.

- *Confidential Class Action Litigation*
Consulting expert analyzing statistical issues associated with claims handling in auto insurance.
- *Class Action v. CNA*
Testifying expert in case involving long-term care insurance premium rates.
- *Confidential Pension Litigation*
Consulting expert in analysis of actuarial and accounting issues in a defined benefit pension plan.
- *Best Buy v. DDR, October*
Testifying expert in analysis of insurance costs applicable to common areas of retail developments.
- *Barnes & Noble v. DDR*
Testifying expert in analysis of insurance costs applicable to common areas of retail developments.
- *Fireman's Fund v. Cunningham Lindsey*
Testifying expert in analysis of damages related to third-party administration of a commercial auto insurance program.
- *Confidential Regulatory Investigation*
Consulting expert in analysis of policy forms used by a property casualty insurer and corresponding policy forms approved by state regulators.
- *Variable Annuity Remediation*
Consulting expert in analysis of remediation for deficiencies in administering variable annuities.
Assisting with analyzing remediation package and negotiating with regulators and other parties.
- *CSR v. Lloyd's Underwriters*
Testifying expert in coverage litigation involving liability insurance. Report focused on the availability and worldwide capacity for liability insurance during the relevant periods.
- *Economic Impact of Federal Participation in Terrorism Risk*
Coauthored a study with Professor R. Glenn Hubbard, former chair of the President's Council of Economic Advisers. Study, which was commissioned by numerous insurance trade organizations, focused on the economic impact of the Federal TRIA terrorism legislation and the economic impact of failing to renew the legislation.
- *Class Action v. Allstate*
Consulting expert on damages and other issues relating to the estimation of inherent diminished value that may still be present after a vehicle has been repaired following an accident.
- *Class Action v. American Home*
Damages expert for American Home in a litigation involving alleged misreporting of certain types of claims to the Workers' Compensation Insurance Rating Bureau (WCIRB) of California.
- *Class Action v. State Compensation Insurance Fund*
Damages expert for plaintiffs in a litigation involving claims estimation and reserving practices of State Compensation Insurance Fund in California.

- *Class Action v. Knights of Columbus*
Economic expert for the Knights of Columbus in a major sales practices litigation involving over 500,000 policyholders. Estimated the damage to policyholders under alternative theories of liability, including development of computer-based policy performance models.
- *Various Confidential Class Action Litigations v. Mutual Life Insurance Companies*
Consulting expert in the analysis of sales practices for four major class action litigations involving between 100,000 and 3.6 million policyholders. Work included estimating the incidence of various allegations, evaluating the financial exposure and recommending alternatives to management and directors.
- *Insurance Modal Premium Litigation*
Consulting expert on issues relating to the estimation of potential damages exposure for modal premium litigation. Prepare preliminary analyses of economic costs and benefits of modal premium payments on policyholders.
- *Confidential Liability Insurance Coverage Litigation*
Economic expert in insurance coverage litigation. Managed the abstracting and statistical analysis of information contained in paper records useful for determining the possible insurance coverage.
- *Confidential Disability Insurance Sales Practices Litigation*
Consulting expert for issues related to the sale and product performance of individual disability insurance policies. Designed and implemented large data abstracting effort for the insurance company defendant and assisted in the development and implementation of a settlement for tens of thousands of policyholders.
- *Confidential Mortgage Insurance Litigation*
Consulting expert in a large litigation involving primary mortgage insurance. Analysis of issues involving the provision of various types of services and insurance products.
- *Health Insurance Redesign Litigation*
Consulting expert in the analysis of a major health insurance benefit redesign program. Analysis of various issues associated with estimating damages and developing overall damages models.
- *Confidential Insurance Coverage Litigation Involving Toxic Waste Cleanup Costs*
Consulting expert in the analysis of the allocation of toxic waste cleanup costs across various insurance companies. Developed a sophisticated model to predict the allocation behavior of the claimant under alternative scenarios. Assisted client personnel and counsel in modeling the impact on the client insurance company under different scenarios to assist in litigation and settlement negotiations.
- *Class Action v. Ohio National*
Economic expert for Ohio National in a major class action litigation involving over 100,000 whole life and universal life policies. Estimated the incidence of various allegations, evaluated financial exposure, presented recommendation to management and outside counsel, and developed models to project ultimate class member “take rates” for particular forms of relief.
- *Arroyo v. Alexander & Alexander*
Damages expert in a sales practices case involving the sale and subsequent performance of a universal life insurance policy. Analyzed exposure and damages.

- *Life Insurance/Pension Program Litigation*
Consulting and testifying expert in a complex sales practices case involving the sale of universal life insurance policies used to help fund a pension program for a large trade association. Analysis assisted counsel in determining exposure and damages.
- *Morris v. Fremont Life*
Consulting expert to assist in evaluating sales practices of an insurance agent selling an annuity product.
- *Archuleta v. Fremont Life*
Consulting expert to assist in refuting damages claims put forward by the plaintiff's expert regarding the sale and performance of a Universal Life insurance policy.

Finance and Securities

- *Securities Litigation*
Consulting expert on numerous issues in a securities matter involving allegations of omissions related to a large IPO.
- *Securities Litigation*
Consulting expert on numerous issues in a securities matter involving allegations of omissions and misleading financial guidance.
- *Confidential Investigation*
Consulting expert on finance and accounting issues for US Department of Justice (DOJ) in matter involving food stamp utilization.
- *Fischer v. Fischer Investment Return Analysis*
Testifying expert on the expected rates of investment return for a diversified portfolio of investments.
- *Confidential Mortgage Litigation*
Consulting expert in a matter involving the financial performance of a program for reducing the term and interest amount paid on a mortgage.
- *Confidential Investment Return Litigation*
Testifying expert in a confidential arbitration involving the expected rates of investment returns on different assets classes into the future.
- *Class Action Securities Litigation (Confidential)*
Consulting expert on loss causation issues in a large bondholder securities case.
- *Class Action Securities Litigation (Confidential)*
Consulting expert on loss causation issues in a large securities case.
- *Business Interruption (Confidential)*
Consulting expert in a case involving business interruption for a finance and securities firm.
- *Mortgage Securities Litigation (Confidential)*
Consulting expert in a class action litigation alleging that the financial performance of mortgage securities were adversely affected by poor underwriting and appraisals.

- *Securities Derivative Litigation (Confidential)*
Consulting expert in a derivative litigation alleging that an acquisition failed to adhere to appropriate corporate governance policies.
- *Confidential Cash-Balance Pension Litigation*
Consulting expert in a litigation involving the damages calculation for a class of cash balance pension participants who terminated prior to retirement.
- *Confidential CDO Litigation*
Consulting expert in a litigation involving the valuation, financial performance, and default history of various collateralized debt obligations.
- *Confidential Securities Litigation*
Consulting expert in a 10b-5 securities litigation.
- *Confidential Tax Shelter Litigation*
Consulting expert in a tax litigation matter for the State of California analyzing the economic basis for an identified series of transactions.
- *Confidential Securities Class Action*
Consulting expert in large securities class action matter involving allegations of failure to provide accurate financial guidance.
- *Stock Option Backdating Litigation*
Consulting expert on stock option backdating matter.
- *Portfolio Diversification*
Consulting expert on issues relating to portfolio diversification in a large trust.
- *Stock Option Backdating Litigation*
Consulting expert on stock option backdating matter in private securities litigation.
- *Confidential SEC Investigation*
Consulting expert on a Securities and Exchange Commission (SEC) investigation relating to reinsurance disclosures.
- *Confidential Mutual Fund Litigation*
Consulting expert on litigation related to late trading of international mutual funds.
- *Williams Communication Securities Litigation*
Consulting expert on 10b-5 litigation alleging audit failures led to stock decline. Case dismissed.
- *Class Action v. Ernst & Young*
Consulting expert on 10b-5 litigation alleging audit failures led to stock decline. Case went to verdict with a no liability verdict for client, Ernst & Young.
- *Confidential Securities Litigation*
Consulting expert assisting academic affiliate in analysis focused on the reasonableness of company disclosures based on internal company budgets and forecasts.

- *Confidential Securities Litigation*
Consulting expert for counsel in securities litigation focused on company disclosures.
- *IRS v. Center Apartments*
Consulting expert assisting Professor Steve Grenadier in the analysis of proper commercial apartment mortgage interest rates.
- *Class Action v. Major Investment Bank*
Consulting expert analyzing the impact of releasing allegedly fraudulent investment information on the stock price of two small software companies for a 10b-5 securities litigation.
- *Class Action v. Conseco*
Consulting expert analyzing the value of a proposed settlement involving universal life crediting rates. Assisted expert in the financial evaluation of the value of the proposed settlement using interest rate simulation models.
- *IRS v. Major Retail Chain*
Consulting expert in defense of a major retail chain. Provided assistance in evaluating various expert reports involving the economic consequences of the purchase of a particular investment.
- *In re: NASDAQ Market Maker Antitrust Litigation*
Consulting expert analysis of millions of stock transactions for seven different NASDAQ market makers facing allegations of conspiracy and price-fixing.

Commercial Damages

- *State of Washington v. Comcast*
Testifying expert in litigation involving allegations related to the provision of repair services to cable TV customers.
- *Confidential Regulatory Breach Litigation*
Consulting expert on damages and accounting issues in litigation involving a breach of federal regulations in the retail food industry.
- *Confidential Employment Breach Arbitration*
Consulting expert on damages in an arbitration involving a breach of employment obligations.
- *Confidential Breach of Contract Arbitration*
Testifying expert on damages in litigation involving a breach of contract for a health care claims administration company.
- *Confidential Breach of Contract Arbitration*
Testifying expert on damages in litigation involving a breach of contract for a laboratory billing company.
- *Metzner v. Permanente Medical Group*
Testifying expert on damages in litigation involving allegations of wrongful termination.
- *Confidential Commercial Airline Litigation*
Testifying expert on damages and statistical issues in litigation involving the payment of fees for interrupted travel.

- *2880 Stevens Creek v. Blach Construction*
Testifying expert on loss-of-use damages in litigation involving construction defects.
- *Polteco v. Tecsuit*
Testifying expert on damages in litigation involving the failure of specialized machinery in a manufacturing operation.
- *Confidential Auto Dealership Litigation*
Analysis of liability and damages issues in litigation involving auto dealership sales practices.
- *F&A Restaurant Group v. Shepard and Reyes*
Analysis of damages relating to the sale of a restaurant. Provided arbitration testimony.
- *US Unwired v. Sprint*
Assisted Analysis Group affiliate Robert Hall in the damages analysis associated with the change in status of Sprint's affiliate, US Unwired. Case settled after trial testimony had been presented.
- *Confidential Enterprise Software Litigation*
Assisted Analysis Group affiliate in the damages analysis associated with loss of business in the enterprise software market.
- *Her Associates v. Kaiser*
Damages expert for defense in litigation related to consulting firm's damages claim.
- *General American v. KPMG*
Damages expert for plaintiffs in litigation related to auditor's alleged obligation to disclose certain financial instruments.
- *Creative Artists v. County of Santa Clara*
Damages expert for defense in litigation related to the cancellation of musical events at facilities owned by the County of Santa Clara.
- *Class Action v. Ford Credit*
Damages expert for plaintiffs analyzing the costs and charges associated with late fees on consumer auto leases.
- *Bar None v. The Duncan Group, January*
Damages expert for defense analyzing damages associated with the failed efforts to develop a software program to be used in automating the subprime auto lending business.
- *Coram v. Aetna*
Consulting expert for defense analyzing the damages associated with a home health care contract that experienced higher costs than anticipated. Supported industry expert in the cost analysis.
- *Confidential Breach of Contract Litigation*
Consulting expert for defense analyzing the damages associated with the failed joint venture development of a removable storage device for personal computers. Supported academic expert in the analysis of damages.

- *Bourns v. Raychem*
Consulting expert for defense analyzing damages associated with the monopolization of the market for primary lithium battery safety devices. Supported academic experts in the analysis of damages.
- *Procter & Gamble v. Amway*
Consulting expert for plaintiff analyzing the impact of disparaging comments and rumors on the sales of Procter & Gamble products. Supported academic experts in the analysis of primary and secondary data sources and the development of surveys and laboratory experiments to test the impact of rumors on consumer behavior.

Valuation / Intellectual Property

- *Confidential Stock Appraisals*
Consulting expert in the appraisal of the stock value for several publicly traded companies that have been challenged in Delaware Chancery Court.
- *Dell Stock Appraisal*
Consulting expert in the Delaware appraisal of Dell's shares arising from the October 2013 leveraged buyout of Dell's public shareholders.
- *Confidential International Arbitration*
Testifying damages expert in dispute involving alleged breach of licensing and joint development agreements.
- *Confidential Business Valuation*
Designated expert in a business valuation for a medical practice.
- *Confidential Patent Litigation*
Consulting expert in litigation involving PC networking technology.
- *Confidential Patent Litigation*
Consulting expert on determination of royalty amounts in a confidential semiconductor patent litigation.
- *Confidential High-Technology Manufacturing Company Valuation*
Valuation expert analyzing economic factors associated with the value of a closely held manufacturer of specialized high tech components for defense applications.
- *Confidential Beverage Distributor Valuation*
Valuation expert analyzing the value of the large beverage distributor.
- *Confidential Patent Infringement Litigation*
Consulting expert on reasonably royalties and damages in the semiconductor industry.
- *Appaloosa Interactive Corporation v. Stephen Friedman and Related Cross-Actions, 2007*
Valuation and damages expert in the video game development industry.
- *Confidential Insurance Company Valuation*
Valuation expert analyzing the value of a private auto insurer for a Delaware valuation matter.

- *Carrino v. Carrino*
Valuation expert analyzing the value of an investment management firm. Provided trial testimony.
- *Confidential Valuation*
Valuation expert analyzing the value of capital contributions to a series of jointly invested real estate transactions.
- *Confidential Company Valuation*
Valuation expert analyzing a privately held health care provider.
- *Confidential Company Valuation*
Valuation expert analyzing a privately held consulting firm.
- *Confidential Software Distribution Dispute*
Damages expert in an arbitration involving software distribution.
- *Capo v. Dioptics, January*
Intellectual property damages expert in a trade dress case involving protective sunglasses.
- *Arthur Stockton v. Fidelity & Deposit*
Analysis of the value of an investment management firm and any damages related to the payment of claims by the insurer.
- *Confidential Company Valuation*
Valuation expert analyzing a privately held construction firm.
- *Redlands Insurance Company v. Edward Wolkowitz*
Valuation expert for plaintiff analyzing the valuation and rating analysis of Redlands Insurance Company, a property and casualty insurer.
- *Confidential Catastrophic Insurance Company Valuation*
Consulting expert for defense analyzing the valuation methodology used by the plaintiffs in the valuation of a catastrophic risk insurance modeling company.
- *Trigon v. United States of America*
Valuation expert for defense analyzing the valuation methodology used by plaintiffs' expert for intangible assets.
- *Synbiotics v. Heska, November*
Damages expert for defense in a patent infringement case involving antibody tests for animal diseases.
- *Air Products v. ATMI*
Damages expert in a patent infringement case involving gases used for semiconductor manufacturing.
- *Confidential Telecommunications Equipment Trade Secret Litigation*
Consulting expert analyzing the potential damages from the sale of telecommunications equipment allegedly containing trade secrets. Supported Analysis Group expert in the analysis of relevant data and the development of reasonable royalty damages estimates and potential lost profits.

- *Bingo Card Minder v. Gametek*
Consulting expert analyzing reasonable royalties for a handheld computer-based consumer product.
Supported Analysis Group expert in the analysis of relevant data and development of reasonable royalty percentages.

Health Care

- *Confidential Provider Network Dispute*
Consulting expert analyzing issues associated with the development and maintenance of a provider network.
- *Dual Diagnosis Treatment Center, et al. v. Health Net*
Consulting expert in a matter involving the provision of addiction care services.
- *CEP America – California v. Heritage Provider Network*
Testifying expert in a matter involving the determination of reasonable value for physician services.
- *CSNI v. Blue Shield*
Testifying expert in a matter involving the determination of reasonable value for physician services.
- *Confidential Arbitrations*
Consulting and testifying expert in matters involving reasonable value rates.
- *Confidential Addiction Care Analysis*
Consulting expert in a matter involving the provision of addiction care services.
- *Confidential Investigation of Charity Care*
Consulting expert in a matter involving the provision of hospital charity care.
- *NorthBay Healthcare Group v. Blue Shield*
Testifying expert in a matter involving the determination of reasonable value for hospital services.
- *YDM Management Inc. v. Blue Shield*
Testifying expert in a matter involving the determination of reasonable value for physician services.
- *San Jose Neurospine v. Blue Shield*
Testifying expert in a matter involving the determination of reasonable value for physician services.
- *Bodner, et al. v. Blue Shield*
Testifying expert in a matter involving the disclosures and financial payments for various types of physician services.
- *Confidential Payor-Provider Disputes*
Economic expert in litigation over payment for emergency and post-stabilization care.
- *Confidential Payor-Provider Dispute*
Economic expert in arbitration over payment for emergency and post-stabilization care.
- *Des Roches, et al. v. Blue Shield and Magellan*
Class certification expert for Blue Shield in a matter involving the use of guidelines for certain behavioral health services.

- *Confidential Hospital Payment Dispute*
Economics testifying expert in a case involving payments for hospital services.
- *Confidential Hospital Payment Dispute*
Economics testifying expert in a case involving payments for hospital services.
- *Confidential Laboratory Payment Dispute*
Economics testifying expert in a case involving payments for laboratory services.
- *Goel v. Blue Shield*
Economics testifying expert in a case involving the determination of reasonable value for emergency department cardiology services.
- *Confidential Hospital Payment Dispute*
Economics and statistical expert in a litigation involving the determination of payment levels associated with disputed status of certain payor groups.
- *NCAA Concussion Litigation*
Economics expert in litigation involving the adequacy of funding for a medical monitoring program for a class of NCAA athletes.
- *Confidential Health Care Litigation*
Consulting expert in a matter involving a dispute over the classification of various health care expenses related to deductible and maximum out-of-pocket expenditures.
- *Confidential Health Care Arbitration*
Testifying expert in a dispute between a payor and provider involving payment levels and business practices.
- *Martin, et al. v. Blue Shield*
Testifying expert on class certification issues in a matter involving plan-level premium change calculations for individual health insurance policies.
- *Prime v. Kaiser*
Damages expert in dispute involving business practices and claims payment issues.
- *Confidential Health Care Litigation*
Damages expert in a dispute involving group health insurance.
- *Confidential Class Action Litigation*
Consulting expert on damages issues in a dispute over coverage issues for certain types of individual health insurance policies.
- *Confidential Payor/Provider Dispute*
Consulting expert on damages issues in a dispute between a payor and provider involving payment terms and allowed services.

- *Confidential Arbitration*
Expert on damages issues in a dispute between a payor and provider affecting enrollment and profitability for a large Medicare managed-care program and other patient programs.
- *Class Action v. Wellpoint*
Expert on class certification matters in a class action alleging improper termination of a health insurance company.
- *Confidential Arbitration*
Expert on damages issues in a dispute between a payor and provider regarding a change in payment methodology.
- *Clark v. Blue Shield*
Expert for defense assisting in the economic analysis of policy rescission.
- *Confidential Arbitration*
Expert on damages calculation in a dispute between a health insurer and a provider of supplemental insurance benefits.
- *Confidential Hospital Association*
Consultant assisting with developing economic models and developing legislative for Medicaid financing arrangements among hospitals.
- *Paul v. Blue Shield*
Expert for defense assisting in the economic analysis of policy rescission.
- *Simoes v. Blue Shield*
Expert for defense assisting in the economic analysis of policy rescission.
- *Hailey v. Blue Shield*
Expert for defense assisting in the economic analysis of policy rescission.
- *Leyra v. Blue Shield*
Expert for defense assisting in the economic analysis of liability for policy rescission.
- *Sutter v. Blue Shield*
Consulting expert for defense assisting in the economic analysis of hospital charges.
- *Various Health Insurance Matters*
Consulting expert for defense assisting in the economic analysis of policy rescissions.
- *Class Action v. Health Insurer*
Consulting expert for defense assisting in the economic analysis of liability for alleged misclassification of patient populations.
- *Missouri Stem Cell Economic Valuation*
Authored a study examining the likely economic impact of possible health research breakthroughs for health care costs in Missouri.

- *California Stem Cell Economic Impact Valuation*
Coauthored a study with Professor Laurence Baker of Stanford examining the likely economic impact of a proposed major health research initiative in California.
- *Health Guideline Analysis*
Consulting expert leading a team of health economists and statisticians in the evaluation of clinical and payment guidelines developed for heart valve replacement surgery.
- *California Attorney General v. Alta Bates/Summit Medical*
Consulting expert analyzing the ability of managed care plans to move patients in response to quality or price incentives. Supported industry expert in developing report and preparing for deposition.
- *Various Hospital Mergers*
Financial expert for various clients analyzing proposed mergers between not-for-profit community hospitals. Estimated the potential efficiencies resulting from the mergers, conducted market research on community needs, and presented findings to management, directors, and outside counsel.
- *Class Action Health Insurance Litigation*
Hired by the nation's largest mediation service to serve as a neutral expert in a litigation involving the calculation of health insurance payments. Worked with experts from both sides and assisted the mediator in bringing the parties to a settlement.

Antitrust and Other Cases

- *Medical Supply Rental*
Consulting expert in antitrust matter alleging antitrust harm and damage related to medical equipment rentals.
- *Slovin, et al. v. Sunrun, et al.*
Testifying expert on class action and data issues in a matter involving allegations of improper telephone sales calls.
- *Lucero v. Solar City*
Testifying expert on class action and data issues in a matter involving allegations of improper telephone sales calls.
- *Solyndra v. Trina, et al.*
Testifying expert on antitrust and damages issues in a matter involving allegations of below-cost pricing for solar panels.
- *Confidential Antitrust Investigation*
Consulting expert on antitrust issues in the automobile industry.
- *US Department of Justice v. Richard Bai*
Testifying expert on antitrust issues in a price-fixing case in the LCD industry.
- *Confidential Antitrust Investigation*
Consulting expert on antitrust issues in a high tech industry.

- *Indirect Purchaser Class Action v. AUO, et al.*
Designated testifying expert on antitrust issues in an alleged price-fixing case in the LCD industry.
- *Korean Fair Trade Commission v. AUO, et al.*
Designated testifying expert on antitrust issues in an alleged price-fixing case in the LCD industry.
- *US Department of Justice v. AUO*
Testifying expert on antitrust issues in price-fixing case in the LCD industry.
- *Confidential Antitrust Investigation*
Consulting expert on antitrust issues in a high technology industry.
- *Confidential Predatory Pricing Litigation*
Consulting expert on litigation related to antitrust claims in the replacement auto parts industry.
- *Confidential Private Antitrust Litigation*
Consulting expert on litigation related to antitrust claims in the building construction industry.
- *Regulatory Investigation*
Consulting expert for government regulatory body investigating allegations of consumer overcharges.
- *Class Action v. Noranda and DuPont*
Consulting expert for defense assisting in the economic analysis of liability for alleged antitrust violations affecting sulfuric acid in the United States.
- *Class Action v. Microsoft*
Consulting expert for defense assisting in the economic analysis of antitrust liability and damages issues in a series of price overcharge litigations. Assist various academic affiliates, including Professor Robert Hall.
- *Neon v. BMC Antitrust Litigation*
Consulting expert for plaintiffs analyzing antitrust violations in the sale of computer software for large computer databases. Supported academic affiliate expert in the analysis of relevant data and development of damages estimates.
- *CFM v. Dainippon Screen Mfg. Co.*
Consulting expert for defense analyzing the potential monopolization by CFM of the semiconductor cleaning market. Support academic affiliate, Professor Robert Hall.
- *Proposed Merger of WorldCom and Sprint*
Consulting expert assisting in the economic evaluation of the proposed merger between WorldCom and Sprint. Evaluate issues relating to market share and pricing of residential long distance services.

TEACHING

1994–96	Teaching Fellow, <i>Analytic Methods</i> , Kennedy School of Government, Harvard University
1994–96	Instructor, <i>Economics Summer Program for Mid-Career Graduate Students</i> , Kennedy School of Government, Harvard University
1989–90	Teaching Assistant, <i>Statistics</i> , Kennedy School of Government, Harvard University

PUBLICATIONS AND REPORTS

“COVID-19’s Strain on Hospitals May Necessitate More Relief,” with Mark Gustafson and Phil Hall-Partyka, *Law360* (May 26, 2020)

“Presentation of Econometric Analyses,” with Samuel Weglein, in *Econometrics: Legal, Practical, and Technical Issues*, published by the American Bar Association (2014)

“Risk Management and the Economic Impact of Terrorism,” with Peter Hess, in *Business Continuity and Homeland Security, Volume 1*, edited by David H. McIntyre and William I. Hancock, Edward Elgar Publishing (2012)

“Taming a Whale Lurking in Pension Financing,” *Pensions & Investments* (August 9, 2010)

Interim Economic Impact Review, with Laurence Baker, CIRM (California Stem Cell Agency) (October 10, 2008)

Winning Initiative Campaigns with Economic Analysis, *Campaigns & Elections*, 39 (February 2006)

“The Economic Effects of Federal Participation in Terrorism Risk,” with R. Glenn Hubbard and Peter Hess, *Risk Management and Insurance Review*, Vol. 8, No. 2, 177–209 (2005)

Some Economic Implications of State Stem Cell Funding Programs, with Lawrence Baker, prepared for “States and Stem Cells: A Symposium on the Policy and Implications of State-Funded Stem Cell Research, Woodrow Wilson School, Princeton University (April 15, 2005)

Health Analysis of the Potential Benefits of SCNT Stem Cell Research and Therapies in Missouri: Patient Population and Health Care Costs (February 8, 2005)

The Economic Effect of Federal Participation in Terrorism Risk, with R. Glenn Hubbard (September 14, 2004)

Economic Impact Analysis Proposition 71: California Stem Cell Research and Cures Initiative, with Laurence Baker (September 14, 2004)

“Hospital Consolidation: Optimal Strategy for a Two-Hospital Town,” with John F. Tiscornia, in *Ambulatory Health Care: Case Studies for the Health Services Executive*, edited by Austin Ross and Mary Richardson, Health Administration Press (1996)

PRESENTATIONS

“Modern Strategies & Approaches in Consumer Class Action Suits”, presented on expert witness issues at a continuing education forum for attorneys sponsored by the National Law Journal (November 2012)

“The Subprime Mortgage Crisis and Disclosures: What Went Wrong?”, presented at a webinar continuing education forum for attorneys sponsored by Analysis Group/Economics (July 29, 2008)

“The Subprime Mortgage Crisis and Disclosures: What Went Wrong?”, presented at a continuing education forum for attorneys sponsored by Analysis Group/Economics, San Francisco, CA (June 24, 2008)

“Stock Option Backdating”, presented at a continuing education forum for attorneys sponsored by Analysis Group/Economics, New York, NY (March 21, 2007)

“Stock Option Backdating”, presented at a continuing education forum for attorneys sponsored by Analysis Group/Economics, Menlo Park, CA and San Francisco, CA (November 7, 2006)

“Overview of Stem Cell Legislation”, moderator and presenter at a presentation on implementing California’s stem cell initiative, sponsored by the Food and Drug Law Institute (FDLI), San Mateo, CA (March 9, 2004)

“Challenges to Expert Testimony,” presentation at Law Seminar International Conference, San Francisco, CA (November 5, 2004)

“Federal Terrorism Insurance Panel Discussion,” presentation and panel participant, National Press Club, Washington, DC (October 24, 2004)

“Insurance 101,” presentation on the design and performance of whole life and universal life policies, presented to customer services representatives administering a life insurance sales practices settlement, Ogden, UT (April 27, 1999)

“Antitrust Case Study: NASDAQ Market Maker Litigation,” presented at a continuing education forum for attorneys sponsored by Analysis Group/Economics, Menlo Park and San Francisco, CA (September 15, 1998)

“An Economist’s Perspective on Life Insurance Sales Practices Problems,” presented at the spring meeting of the Society of Actuaries, Maui, HI (June 15, 1998)

“Valuing Intellectual Property in an Age of Employee Mobility,” presented at a continuing education forum for attorneys sponsored by Analysis Group/Economics, Menlo Park and San Francisco, CA (June 9, 1998)

EXPERT DESIGNATION, TESTIMONY, AND REPORTS

December 2025	Expert deposition in <i>Hunnewell Partners (BVI) Limited, et al. v. Deloitte Transactions and Business Analytics LLP (economic damages)</i>
November 2025	Expert report in <i>Confidential Litigation (statistical analysis)</i>
November 2025	Expert declaration in <i>In re: Google RTB Consumer Privacy Litigation (consumer privacy class certification matter)</i>
November 2025	Trial testimony in <i>Confidential Arbitration (health insurance payor-provider matter)</i>
October 2025	Trial testimony in <i>Confidential Arbitration (health insurance payor-provider matter)</i>
October 2025	Expert declaration in <i>Gulf-To-Bay Anesthesiology Associates, LLC v. United Healthcare of Florida Inc., et al. (health insurance payor-provider matter)</i>
October 2025	Expert deposition in <i>Confidential Arbitration (health insurance payor-provider matter)</i>

September 2025	Expert rebuttal report in <i>Confidential Arbitration (health insurance payor-provider matter)</i>
September 2025	Expert report in <i>Confidential Arbitration (health insurance payor-provider matter)</i>
September 2025	Arbitration testimony in <i>Confidential Arbitration (health insurance payor-provider matter)</i>
September 2025	Expert deposition in <i>Gulf-To-Bay Anesthesiology Associates, LLC v. United Healthcare of Florida Inc., et al. (health insurance payor-provider matter)</i>
August 2025	Expert deposition in <i>Long Beach Memorial Medical Center, et al. v. Kaiser Foundation Health Plan, Inc., et al. (health insurance payor-provider matter)</i>
August 2025	Expert deposition in <i>Confidential Arbitration (health insurance payor-provider matter)</i>
August 2025	Expert rebuttal report in <i>Long Beach Memorial Medical Center, et al. v. Kaiser Foundation Health Plan, Inc., et al. (health insurance payor-provider matter)</i>
July 2025	Expert report in <i>Hunnewell Partners (BVI) Limited, et al. v. Deloitte Transactions and Business Analytics LLP (economic damages)</i>
July 2025	Expert deposition in <i>State of Ohio, et al. v. Norfolk Southern Corporation, et al. (economic damages)</i>
July 2025	Expert deposition in <i>Confidential Arbitration (health insurance payor-provider matter)</i>
June 2025	Expert report in <i>Gulf-To-Bay Anesthesiology Associates, LLC v. United Healthcare of Florida Inc., et al. (health insurance payor-provider matter)</i>
June 2025	Expert deposition in <i>Confidential Arbitration (health insurance payor-provider matter)</i>
May 2025	Expert report in <i>Confidential Arbitration (health insurance payor-provider matter)</i>
May 2025	Expert report in <i>Confidential Arbitration (health insurance payor-provider matter)</i>
April 2025	Expert declaration in <i>Melissa Douglas, et al. v. EF Institute for Cultural Exchange Inc., et al. (student travel damages)</i>
April 2025	Expert deposition in <i>Damian B. Brown, et al. v. Continental Casualty Company, et al. (long term care insurance class action)</i>
March 2025	Expert deposition in <i>The Spruce House Partnership (AI) LP, et al. v. CohnReznick LLP (economic damages)</i>
March 2025	Expert deposition in <i>Harold Parsons v. The Commerce Insurance Company (proposed claims payment class action)</i>

February 2025	Expert deposition in <i>CEP America – California v. Heritage Provider Network (health insurance payor-provider matter)</i>
February 2025	Expert rebuttal report in <i>Damian B. Brown, et al. v. Continental Casualty Company, et al. (long term care insurance class action)</i>
February 2025	Expert report in <i>CEP America – California v. Heritage Provider Network (health insurance payor-provider matter)</i>
January 2025	Expert rebuttal report in <i>Harold Parsons v. The Commerce Insurance Company (proposed claims payment class action)</i>
September 2024	Expert rebuttal report in <i>Confidential Arbitration (economic damages)</i>
August 2024	Expert deposition in <i>Confidential Arbitration (class certification)</i>
August 2024	Expert deposition in <i>Humberto Lozada, et al. v. TaskUs Inc., et al. (securities class action class certification analysis)</i>
July 2024	Expert deposition in <i>Confidential Arbitration (competition Analysis Group)</i>
July 2024	Expert deposition in <i>Florida Emergency Physicians Kang & Associates, M.D., Inc., et al. v. United Healthcare of Florida, Inc., et al. (health insurance payor-provider matter)</i>
July 2024	Expert report in <i>Humberto Lozada, et al. v. TaskUs Inc., et al. (securities class action class certification analysis)</i>
May 2024	Expert deposition in <i>Anaheim Global Medical Center, Inc., et al. v. Kaiser Foundation Health Plan, Inc., et al. (health insurance payor-provider matter)</i>
May 2024	Expert report in <i>Anaheim Global Medical Center, Inc., et al. v. Kaiser Foundation Health Plan, Inc., et al. (health insurance payor-provider matter)</i>
May 2024	Expert rebuttal report in <i>John Schnatter v. 247 Group, LLC (economic damages matter)</i>
February 2024	Trial testimony in <i>Brian J. Lyngaas, D.D.S., P.L.L.C. v. IQVIA, Inc. (TCPA matter)</i>
February 2024	Expert report in <i>Confidential Arbitration (payor-provider contractual dispute)</i>
January 2024	Expert deposition in <i>Richard E. Fischbein v. IQVIA, Inc. (TCPA matter)</i>
January 2024	Expert deposition in <i>Raytheon Company v. Ahtna Support and Training Services, LLC, et al. (economic damages matter)</i>
January 2024	Expert declaration in <i>California Physicians' Service d/b/a Blue Shield of California v. Advanced Orthopedic Center, Inc. (health insurance payor-provider matter)</i>
January 2024	Expert deposition in <i>Melissa Douglas, et al. v. EF Institute for Cultural Exchange Inc., et al. (class certification matter)</i>

December 2023	Trial testimony in <i>Confidential Arbitration (damages related to alleged financial fraud)</i>
December 2023	Expert deposition in <i>PFNonwovens US Inc. v. Grant Thornton LLP (commercial damages matter)</i>
November 2023	Expert report in <i>Melissa Douglas, et al. v. EF Institute for Cultural Exchange Inc., et al. (class certification matter)</i>
November 2023	Expert deposition in <i>State of Washington v. Providence Health & Services, et al. (provision of charity care dispute)</i>
November 2023	Deposition testimony in <i>Hooman Melamed, M.D., Inc. v. Blue Cross of California Life and Health Insurance Company (health insurance payor-provider matter)</i>
November 2023	Expert deposition in <i>Monterey Bay Military Housing, et al. v. Ambac Assur. Corp., et al. (economic damages matter)</i>
October 2023	Expert deposition in <i>In re: Google RTB Consumer Privacy Litigation (consumer privacy class certification matter)</i>
October 2023	Expert report in <i>Confidential Arbitration (economic damages matter)</i>
September 2023	Expert report in <i>In re: Google RTB Consumer Privacy Litigation (consumer privacy class certification matter)</i>
September 2023	Expert report in <i>Raytheon Company v. Ahtna Support and Training Services, LLC, et al. (economic damages matter)</i>
September 2023	Expert deposition in <i>Florida Emergency Physicians Kang & Associates, M.D., Inc., et al. v. United Healthcare of Florida, Inc., et al. (health insurance payor-provider matter)</i>
September 2023	Expert declaration in <i>Emergency Physician Services of New York, et al. v. UnitedHealth Group, Inc., et al. (health insurance payor-provider matter)</i>
September 2023	Expert report in <i>Emergency Physician Services of Pennsylvania, P.C., et al. v. UnitedHealth Group, Inc., et al. (health insurance payor-provider matter)</i>
August 2023	Expert rebuttal report in <i>Florida Emergency Physicians Kang & Associates, M.D., Inc., et al. v. United Healthcare of Florida, Inc., et al. (health insurance payor-provider matter)</i>
August 2023	Expert declaration in <i>Emergency Group of Arizona Professional Corp, et al. v. UnitedHealth Group, Inc., et al. (health insurance payor-provider matter)</i>
August 2023	Expert deposition in <i>Richard E. Fischbein v. IQVIA, Inc. (TCPA matter)</i>
August 2023	Expert deposition in <i>Confidential Arbitration (damages related to alleged financial fraud)</i>

July 2023	Expert deposition in <i>Emergency Physician Services of New York, et al. v. UnitedHealth Group, Inc., et al.</i> (health insurance payor-provider matter)
July 2023	Expert deposition in <i>Emergency Group of Arizona Professional Corp, et al. v. UnitedHealth Group, Inc., et al.</i> (health insurance payor-provider matter)
July 2023	Expert report in <i>Richard E. Fischbein v. IQVIA, Inc.</i> (TCPA matter)
July 2023	Expert declaration in <i>Florida Emergency Physicians Kang & Associates, M.D., Inc., et al. v. United Healthcare of Florida, Inc., et al.</i> (health insurance payor-provider matter)
June 2023	Expert report in <i>Emergency Group of Arizona Professional Corp, et al. v. UnitedHealth Group, Inc., et al.</i> (health insurance payor-provider matter)
June 2023	Expert rebuttal report in <i>Emergency Physician Services of New York, et al. v. UnitedHealth Group, Inc., et al.</i> (health insurance payor-provider matter)
June 2023	Expert report in <i>Monterey Bay Military Housing, et al. v. Ambac Assur. Corp., et al.</i> (economic damages matter)
June 2023	Expert declaration in <i>Florida Emergency Physicians Kang & Associates, M.D., Inc., et al. v. United Healthcare of Florida, Inc., et al.</i> (health insurance payor-provider matter)
June 2023	Trial testimony in <i>California Physicians' Service d/b/a Blue Shield of California v. Advanced Orthopedic Center, Inc.</i> (health insurance payor-provider matter)
May 2023	Expert report in <i>Confidential Arbitration</i> (damages related to alleged financial fraud)
May 2023	Expert report in <i>Emergency Physician Services of New York, et al. v. UnitedHealth Group, Inc., et al.</i> (health insurance payor-provider matter)
April 2023	Trial testimony in <i>People of the State of California v. Intuit, Inc.</i> (FTC alleged deceptive advertising matter)
April 2023	Trial testimony in <i>CEP America – California v. Heritage Provider Network</i> (health insurance payor-provider matter)
February 2023	Expert deposition in <i>People of the State of California v. Intuit, Inc.</i> (FTC alleged deceptive advertising matter)
February 2023	Expert deposition in <i>Liberty Dialysis Hawaii LLC, et al. v. Health Management Network Inc., et al.</i> (payor-provider contractual dispute)
January 2023	Expert report in <i>People of the State of California v. Intuit, Inc.</i> (FTC alleged deceptive advertising matter)
December 2022	Arbitration testimony in <i>Confidential Arbitration</i> (contractual dispute)
December 2022	Arbitration testimony in <i>Confidential Arbitration</i> (payor-provider contractual dispute)

December 2022	Expert deposition in <i>Harold Parsons v. The Commerce Insurance Company (proposed claims payment class action)</i>
November 2022	Expert report in <i>Liberty Dialysis Hawaii LLC, et al. v. Health Management Network Inc., et al. (payor-provider contractual dispute)</i>
November 2022	Expert report in <i>Kirk Prest v. BP Exploration & Production, Inc., BP America Production Company, and BP p.l.c. (economic damages)</i>
November 2022	Expert deposition in <i>CEP America – California v. Heritage Provider Network (health insurance payor-provider matter)</i>
October 2022	Expert deposition in <i>Brian J. Lyngaas, D.D.S., P.L.L.C. v. IQVIA, Inc. (TCPA matter)</i>
October 2022	Expert declaration in <i>Dual Diagnosis Treatment Center, Inc., et al. v. Health Net, Inc., et al. (health insurance payor-provider matter)</i>
October 2022	Expert rebuttal report in <i>Brian J. Lyngaas, D.D.S., P.L.L.C. v. IQVIA, Inc. (TCPA matter)</i>
October 2022	Expert deposition in <i>Saint Alphonsus Health Alliance, Inc., et al. v. Corizon LLC, et al. (health insurance payor-provider matter)</i>
September 2022	Expert report in <i>Brian J. Lyngaas, D.D.S., P.L.L.C. v. IQVIA, Inc. (TCPA matter)</i>
August 2022	Expert declaration in <i>Emergency Physician Services of New York, et al. v. UnitedHealth Group, Inc., et al. (health insurance payor-provider matter)</i>
August 2022	Expert report in <i>Saint Alphonsus Health Alliance, Inc., et al. v. Corizon LLC, et al. (health insurance payor-provider matter)</i>
August 2022	Expert deposition in <i>Sheet Metal Workers Local 19 Pension Fund v. ProAssurance Corporation, et al. (class certification opposition in a securities class action)</i>
July 2022	Expert deposition in <i>Jeffrey Leonard, et al. v. John Hancock Life Insurance Company of New York, et al. (life insurance policy performance litigation)</i>
July 2022	Expert declaration in <i>Adam Viguers et al. v. California Physicians' Service (health insurance payor-provider matter)</i>
July 2022	Trial testimony in <i>Dual Diagnosis Treatment Center, Inc., et al. v. Health Net, Inc., et al. (health insurance payor-provider matter)</i>
June 2022	Expert report in <i>Sheet Metal Workers Local 19 Pension Fund v. ProAssurance Corporation, et al. (class certification opposition in a securities class action)</i>
June 2022	Expert declaration in <i>Emergency Physician Services of Pennsylvania, P.C., et al. v. UnitedHealth Group, Inc., et al. (health insurance payor-provider matter)</i>
May 2022	Expert declaration in <i>Florida Emergency Physicians Kang & Associates, M.D., Inc., et al. v. United Healthcare of Florida, Inc., et al. (health insurance payor-provider matter)</i>

May 2022	Expert deposition in <i>Dual Diagnosis Treatment Center, Inc., et al. v. Health Net, Inc., et al.</i> (health insurance payor-provider matter)
May 2022	Expert report in <i>Jeffrey Leonard, In His Capacity As Trustee of the Poplawski 2008 Insurance Trust, et al. v. John Hancock Life Insurance Company of New York, et al.</i> (life insurance matter)
May 2022	Deposition testimony in <i>Travel Nurse Across America, LLC v. Floyd Edwards Holdings, Inc., et al.</i> (company valuation)
March 2022	Deposition testimony in <i>Hooman Melamed, M.D., Inc. v. Blue Shield of California Life and Health Insurance Company</i> (health insurance payor-provider matter)
January 2022	Expert declaration in <i>Eileen S. Natuzzi, et al. v. California Physicians' Service d/b/a Blue Shield of California</i> (class action involving provider payment methodology)
December 2021	Expert report in <i>Los Robles Regional Medical Center, et al. v. Kaiser Foundation Health Plan, Inc., et al.</i> (health insurance payor-provider matter)
December 2021	Deposition testimony in <i>Los Robles Regional Medical Center, et al. v. Kaiser Foundation Health Plan, Inc., et al.</i> (health insurance payor-provider matter)
December 2021	Deposition testimony in <i>Matthew N. Fulton v. Enclarity, Inc., et al.</i> (TCPA matter)
November 2021	Deposition testimony in <i>Los Robles Regional Medical Center, et al. v. Kaiser Foundation Health Plan, Inc., et al.</i> (health insurance payor-provider matter)
November 2021	Expert report in <i>Matthew N. Fulton v. Enclarity Inc., et al.</i> (TCPA matter)
November 2021	Trial testimony in <i>Fremont Emergency Services (Mandavia), Ltd., et al. v. UnitedHealth Group Inc., et al.</i> (health insurance payor-provider matter)
November 2021	Deposition testimony in <i>Confidential – OCC</i> (securities valuation)
October 2021	Expert report in <i>Confidential Litigation</i> (company valuation)
October 2021	Expert declaration in <i>Eileen S. Natuzzi, et al. v. California Physicians' Service d/b/a Blue Shield of California</i> (class action involving provider payment methodology)
September 2021	Expert report in <i>Fremont Emergency Services (Mandavia) Ltd., et al. v. UnitedHealth Group Inc., et al.</i> (health insurance payor-provider matter)
September 2021	Expert declaration in <i>Fremont Emergency Services (Mandavia) Ltd., et al. v. UnitedHealth Group Inc., et al.</i> (health insurance payor-provider matter)
September 2021	Deposition testimony in <i>Fremont Emergency Services (Mandavia) Ltd., et al. v. UnitedHealth Group Inc., et al.</i> (health insurance payor-provider matter)
August 2021	Expert rebuttal report in <i>Fremont Emergency Services (Mandavia) Ltd., et al. v. UnitedHealth Group Inc., et al.</i> (health insurance payor-provider matter)

July 2021	Expert report in <i>Fremont Emergency Services (Mandavia) Ltd., et al. v. UnitedHealth Group Inc., et al.</i> (health insurance payor-provider matter)
June 2021	Deposition testimony in <i>Charles Tillage, et al. v. Comcast, et al.</i> (class action alleging improper disclosure of fees)
May 2021	Deposition testimony in <i>Highfields Capital I LP, et al. v. SeaWorld Entertainment, Inc., et al.</i> (securities fraud litigation)
May 2021	Deposition testimony in <i>Luke Davis, et al. v. Laboratory Corporation of America Holdings</i> (class action alleging damages due to inadequate access to facilities)
April 2021	Expert rebuttal report in <i>Luke Davis, et al. v. Laboratory Corporation of America Holdings</i> (class action alleging damages due to inadequate access to facilities)
April 2021	Deposition testimony in <i>California Physicians' Service v. HealthPlan Services</i> (contract performance dispute)
March 2021	Expert report in <i>Highfields Capital I LP, et al. v. SeaWorld Entertainment, Inc., et al.</i> (securities fraud litigation)
March 2021	Expert report in <i>Luke Davis, et al. v. Laboratory Corporation of America Holdings</i> (class action alleging damages due to inadequate access to facilities)
March 2021	Expert declaration in <i>Dual Diagnosis Treatment Center, et al. v. Health Net, Inc., et al.</i>
February 2021	Deposition testimony in <i>Confidential – OCC</i> (securities valuation)
January 2021	Arbitration testimony in <i>Confidential Arbitration</i> (health insurance payor-provider matter)
January 2021	Expert report in <i>California Physicians' Service v. HealthPlan Services</i> (contract performance dispute)
November 2020	Arbitration testimony in <i>Confidential Arbitration</i> (health insurance payor-provider matter)
November 2020	Expert report in <i>Confidential – OCC</i> (securities valuation)
October 2020	Arbitration testimony in <i>Confidential Arbitration</i> (health insurance payor-provider matter)
October 2020	Expert reply report in <i>California Physicians' Service v. HealthPlan Services</i> (contract performance dispute)
September 2020	Deposition testimony in <i>California Physicians' Service v. HealthPlan Services</i> (contract performance dispute)
September 2020	Deposition testimony in <i>In re: The Allstate Corporation Securities Litigation</i> (class action alleging claim frequency misstatements)

August 2020	Expert declaration in <i>California Physicians' Service v. HealthPlan Services (contract performance dispute)</i>
July 2020	Deposition testimony in <i>Confidential Arbitration (health care pricing dispute)</i>
July 2020	Expert report in <i>Confidential Arbitration (health care pricing dispute)</i>
July 2020	Expert rebuttal report in <i>In re: The Allstate Corporation Securities Litigation (class action alleging claim frequency misstatements)</i>
July 2020	Expert reply report in <i>In re: The Allstate Corporation Securities Litigation (class action alleging claim frequency misstatements)</i>
July 2020	Expert report in <i>Scott Crosby, et al. v. California Physicians' Service, et al. (class action alleging care restrictions)</i>
May 2020	Expert declaration in <i>Scott Crosby, et al. v. California Physicians' Service, et al. (class action alleging care restrictions)</i>
April 2020	Deposition testimony in <i>In re: CenturyLink Sales Practices and Securities Litigation (class action alleging customer cramming and related allegation)</i>
February 2020	Expert report in <i>In re: The Allstate Corporation Securities Litigation (class action alleging claim frequency misstatements)</i>
February 2020	Deposition testimony in <i>CEP America – California v. Heritage Provider Network (health insurance payor-provider matter)</i>
January 2020	Arbitration testimony in <i>Confidential Arbitration (DMHC pricing matter)</i>
January 2020	Expert rebuttal report in <i>Confidential Arbitration</i>
January 2020	Expert report in <i>Confidential Arbitration</i>
January 2020	Arbitration testimony in <i>Confidential Arbitration (ownership dispute matter)</i>
January 2020	Arbitration testimony in <i>Confidential Arbitration (physician IPA affiliation matter)</i>
January 2020	Expert deposition in <i>Confidential Arbitration (DMHC pricing matter)</i>
December 2019	Expert report in <i>Confidential Arbitration</i>
December 2019	Expert report in <i>Confidential Arbitration</i>
December 2019	Expert deposition in <i>Confidential Arbitration (ownership dispute matter)</i>
November 2019	Expert rebuttal report in <i>CEP America – California v. Heritage Provider Network</i>
October 2019	Expert declaration in <i>Dual Diagnosis Treatment Center, et al. v. Health Net</i>
July 2019	Expert declaration in <i>CEP America – California v. Heritage Provider Network</i>

July 2019 Expert deposition in *Physicians Healthsource Inc., et al. v. Masimo Corp. (TCPA matter)*

July 2019 Expert deposition in *Empire Land, LLC (bankruptcy matter)*

June 2019 Expert report in *Prime Healthcare Services, Inc., et al. v. Humana Insurance Company, et al. (Evaluation of health care utilization data)*

June 2019 Expert deposition in *Michael Johnson, et al. v. Comodo Group (TCPA matter)*

June 2019 Trial testimony in *California Spine and Neurosurgery Institute v. Blue Shield (health insurance payor-provider matter)*

June 2019 Arbitration testimony in *Confidential Health Care Payment Matter (health insurance payor-provider matter)*

May 2019 Expert deposition in *California Spine and Neurosurgery Institute v. Blue Shield (health insurance payor-provider matter)*

May 2019 Expert deposition in *Confidential Health Care Payment Matter (health insurance payor-provider matter)*

March 2019 Expert deposition in *California Spine and Neurosurgery Institute v. Blue Shield (health insurance payor-provider matter)*

March 2019 Expert deposition in *Confidential Health Care Payment Matter (health insurance payor-provider matter)*

March 2019 Expert deposition in *Confidential Health Care Payment Matter (health insurance payor-provider matter)*

February 2019 Expert deposition in *San Joaquin General Hospital v. Blue Shield (health insurance payor-provider matter)*

February 2019 Trial testimony in *Northbay Healthcare Group v. Blue Shield (health insurance payor-provider matter)*

February 2019 Expert report in *Confidential Arbitration*

January 2019 Trial testimony in *State of Washington v. Comcast (consumer fraud matter)*

December 2018 Trial testimony in *State of Washington v. Comcast (consumer fraud matter)*

December 2018 Expert deposition in *Northbay Healthcare Group v. Blue Shield (health insurance payor-provider matter)*

November 2018 Expert report in *NorthBay Healthcare Group v. Blue Shield*

September 2018 Expert report in *YDM Management, Inc. v. Blue Shield*

September 2018 Expert deposition in *YDM, Management, Inc. v. Blue Shield (health insurance payor-provider matter)*

August 2018	Expert declaration in <i>San Jose Neurospine v. Blue Shield</i>
July 2018	Expert rebuttal report and deposition in <i>State of Washington v. Comcast</i>
June 2018	Expert report in <i>State of Washington v. Comcast</i>
June 2018	Trial testimony in <i>San Jose Neurospine v. Blue Shield (health insurance payor-provider matter)</i>
May 2018	Expert report in <i>John H. Larry Jr. v. Rexall, et al.</i>
May 2018	Expert deposition in <i>San Jose Neurospine v. Blue Shield (health insurance payor-provider matter)</i>
February 2018	Expert deposition in <i>Bodner, et al. v. Blue Shield (health insurance pricing matter)</i>
January 2018	Expert declaration in <i>Fort Leavenworth Military Housing v. Ambac</i>
December 2017	Expert deposition in <i>Fort Bliss Military Housing v. Ambac (bond insurance matter)</i>
November 2017	Expert deposition in <i>Slovin, et al. v. Sunrun, et al. (TCPA matter)</i>
November 2017	Expert report in <i>Slovin, et al. v. Sunrun, et al.</i>
October 2017	Expert report on economic and class issues in <i>Surrett, et al. v. Western Culinary Institute</i>
October 2017	Expert deposition on damages issues in <i>Mayumac v. Met Life (disability insurance matter)</i>
October 2017	Expert deposition on class certification issues in <i>Des Roches v. Blue Shield / Magellan (health insurance benefits matter)</i>
October 2017	Expert report on statistical issues in <i>Scott v. Cricket</i>
October 2017	Expert report in <i>Fort Bliss Military Housing v. Ambac</i>
September 2017	Expert report in <i>Fort Riley Military Housing v. Ambac</i>
September 2017	Expert declaration in <i>San Jose Neurospine v. Blue Shield</i>
August 2017	Expert deposition in <i>Confidential Health Care Payment Matter (health insurance payor-provider matter)</i>
July 2017	Expert deposition in <i>Confidential Health Care Payment Matter (health insurance payor-provider matter)</i>
July 2017	Expert deposition in <i>Starks, et al. v. Geico Indemnity (auto insurance class action)</i>

June 2017	Expert deposition in <i>Confidential Health Care Payment Matter</i> (health insurance payor-provider matter)
May 2017	Expert declaration on financial issues in <i>Monterey Military Housing v. Ambac</i>
April 2017	Expert declaration on class certification issues in <i>Des Roches v. Blue Shield/Magellan</i>
April 2017	Expert declaration on class certification and data issues in <i>Lucero v. Solar City</i>
April 2017	Expert rebuttal report in <i>Fort Meade Military Housing v. Ambac</i>
March 2017	Expert deposition in <i>Fort Meade Military Housing v. Ambac</i> (bond insurance matter)
March 2017	Expert declaration in <i>Monterey Military Housing v. Ambac</i>
February 2017	Expert testimony in <i>Fort Meade Military Housing v. Ambac</i> (bond insurance matter)
February 2017	Expert declaration in <i>Fort Meade Military Housing v. Ambac</i>
February 2017	Expert declaration in <i>Confidential Hospital Payment Dispute</i>
January 2017	Arbitration testimony in <i>Confidential Health Care Payment Matter</i> (health insurance payor-provider matter)
January 2017	Expert testimony in <i>Fort Bliss Military Housing v. Ambac</i> (bond insurance matter)
January 2017	Expert declaration in <i>Fort Riley Military Housing v. Ambac</i>
December 2016	Expert declaration in <i>Fort Bliss Military Housing v. Ambac</i>
December 2016	Expert declaration in <i>Fort Meade Military Housing v. Ambac</i>
December 2016	Trial testimony in <i>Ben-E-Lect v. Anthem</i> (health insurance design matter)
December 2016	Arbitration testimony in <i>Confidential Health Care Payment Matter</i> (health insurance payor-provider matter)
October 2016	Arbitration testimony in <i>Confidential Breach of Contract Arbitration</i> (TPA valuation matter)
October 2016	Expert report in <i>Confidential Hospital Payment Dispute</i>
September 2016	Trial testimony in <i>Goel v. Blue Shield</i> (health insurance payor-provider matter)
September 2016	Expert declaration in <i>Monterey Military Housing v. Ambac</i>
September 2016	Expert declaration in <i>Bodner, et al. v. Blue Shield</i>
August 2016	Arbitration testimony in <i>Confidential Health Care Payment Matter</i> (health insurance payor-provider matter)

July 2016	Arbitration testimony in <i>Confidential Health Care Payment Matter</i> (health insurance payor-provider matter)
May 2016	Expert declaration in <i>Monterey Military Housing v. Ambac</i>
April 2016	Deposition testimony in <i>Confidential Health Care Payment Matter</i> (health insurance payor-provider matter)
February 2016	Arbitration testimony in <i>Confidential Health Care Payment Matter</i> (health insurance payor-provider matter)
January 2016	Expert declaration in <i>Bodner, et al. v. Blue Shield</i>
December 2015	Arbitration testimony in <i>Confidential Hospital Payment Dispute</i>
December 2015	Expert deposition in <i>Chinese Drywall Products Liability Litigation</i>
December 2015	Expert declaration in <i>Bodner, et al. v. Blue Shield of California</i>
December 2015	Trial testimony in <i>Metzner v. Permanente Medical Group</i>
October 2015	Expert report in <i>Chinese Drywall Products Liability Litigation</i>
September 2015	Expert deposition in <i>Metzner v. Permanente Medical Group</i>
August 2015	Expert testimony in <i>Confidential Health Care Arbitration</i>
July 2015	Expert deposition in <i>Solyndra v. Trina, et al.</i>
April 2014	Expert report (update) in <i>NCAA Concussion Litigation</i>
January 2015	Expert deposition in <i>Prime v. Kaiser</i>
December 2014	Expert report (update) in <i>NCAA Concussion Litigation</i>
December 2014	Expert deposition in <i>Martin, et al. v. Blue Shield of California</i>
November 2014	Expert testimony in <i>Confidential International Arbitration</i>
September 2014	Expert deposition in <i>Confidential Insurance Matter</i>
July 2014	Expert report in <i>NCAA Concussion Litigation</i>
July 2014	Expert testimony in <i>Confidential Wrongful Termination Matter</i>
July 2014	Expert report in <i>Confidential Disability Insurance Matter</i>
May 2014	Expert report in <i>Martin v. Blue Shield of California</i>
May 2014	Expert declaration in <i>Martin v. Blue Shield of California</i>

December 2013	Expert report in <i>Confidential Airline Litigation</i>
December 2013	Expert testimony in <i>Confidential Investment Return Litigation</i>
December 2013	Expert deposition in <i>Confidential Investment Return Litigation</i>
November 2013	Expert declaration in <i>Long Trust v. Morgan Stanley</i>
November 2013	Expert report in <i>Long Trust v. Morgan Stanley</i>
November 2013	Expert testimony in <i>Confidential Employment Litigation</i>
November 2013	Expert deposition in <i>Confidential Employment Litigation</i>
November 2013	Expert deposition in <i>Katz v. Mass Mutual</i>
October 2013	Expert report in <i>Katz v. Mass Mutual</i>
October 2013	Expert report in <i>Circuit City, et al. v. AUO</i>
October 2013	Summary witness expert testimony in <i>US Department of Justice v. Richard Bai</i>
January 2013	Expert testimony in <i>Confidential Arbitration</i>
January 2013	Expert deposition in <i>Confidential Arbitration</i>
December 2012	Expert declaration in <i>Markocki v. Olde Republic Title</i>
December 2012	Expert deposition in <i>Paul v. Blue Shield of California</i>
June 2012	Expert deposition in <i>Indirect Purchaser Class Action v. AUO</i>
June 2012	Expert deposition in <i>Asbestos Litigation v. Borg Warner</i>
May 2012	Expert report in <i>Indirect Purchaser Class Action v. AUO</i>
April 2012	Expert deposition in <i>2880 Stevens Creek v. Blach Construction Co.</i>
April 2012	Expert deposition in <i>Indirect Purchaser Class Action v. AUO</i>
March 2012	Expert report in <i>Indirect Purchaser Class Action v. AUO</i>
February 2012	Expert testimony in <i>United States Department of Justice v. AUO</i>
February 2012	Expert deposition in <i>Campbell v. MetLife</i>
November 2011	Expert deposition in <i>Cox v. Allstate</i>
October 2011	Expert report in <i>Cox v. Allstate</i>

October 2011	Expert deposition in <i>Class Action v. Wellpoint</i>
October 2011	Expert designation in <i>US Department of Justice v. AUO</i>
October 2011	Expert report in <i>KFTC v. AUO</i>
July 2011	Expert report in <i>Class Action v. Wellpoint</i>
June 2011	Expert report in confidential damages arbitration
November 2010	Expert testimony in <i>Jasmine v. Marvell</i>
October 2010	Expert testimony in <i>US Government v. Jerry Cash</i>
July 2010	Expert deposition in <i>M.E. Fox & Co. Valuation matter</i>
June 2010	Expert designation in <i>M.E. Fox & Co. Valuation matter</i>
May–June 2010	Expert testimony in <i>Polteco v. Tecsult</i>
March 2010	Expert deposition in <i>Simoes v. Blue Shield</i>
December 2009	Expert designation in <i>Simoes v. Blue Shield</i>
October 2009	Affidavit in <i>Best Buy v. DDR</i>
March 2009	Expert deposition in <i>Hailey v. Blue Shield</i>
March 2009	Expert report in <i>Hausman v. Union Bank</i>
March 2009	Expert report in <i>Perez v. First American Title Insurance Company</i>
March 2009	Trial testimony in <i>Windham v. Cook</i>
February 2009	Expert report in <i>Windham v. Cook</i>
January 2009	Expert designation in <i>Hailey v. Blue Shield</i>
October 2008	Deposition testimony in <i>Pavlov, et al. v. CNA</i>
September 2008	Expert declaration in <i>Pavlov, et al. v. CNA</i>
September 2008	Trial testimony in <i>Freidman v. Sega, et al.</i>
September 2008	Expert report in <i>Freidman v. Sega, et al.</i>
July 2008	Deposition testimony in <i>Freidman v. Sega, et al.</i>
July 2008	Deposition testimony in <i>Best Buy v. DDR</i>
June 2008	Expert report in <i>Best Buy v. DDR</i>

October 2007	Expert designation in <i>Rowlands v. Blue Shield</i>
September 2007	Deposition testimony in <i>Class Action v. CNA</i>
September 2007	Expert report in <i>Class Action v. CNA</i>
May 2007	Deposition testimony in <i>Tronox v. Rio Algom</i>
April 2007	Expert designation in <i>Callil v. Blue Shield</i>
April 2007	Expert designation in <i>Abbott v. Blue Shield</i>
March 2007	Deposition testimony in <i>Leyra v. Blue Shield Life and Health</i>
December 2006	Expert designation in <i>Leyra v. Blue Shield Life and Health</i>
August 2006	Arbitration testimony in <i>F&A Restaurant Group v. Shepard and Reyes</i>
July 2006	Trial testimony in <i>Carrino v. Carrino</i>
July 2006	Deposition testimony in <i>Carrino v. Carrino</i>
February 2006	Arbitration testimony in <i>ART v. Riverdeep</i>
January 2006	Deposition testimony in <i>ART v. Riverdeep</i>
December 2005	Deposition testimony in <i>FFIC v. Cunningham Lindsey</i>
September 2005	Deposition testimony in <i>Barnes & Noble v. DDR (Texas and Kansas)</i>
September 2005	Expert report in <i>Fireman's Fund v. Cunningham Lindsey</i>
September 2005	Expert report in <i>Barnes & Noble v. DDR (Kansas)</i>
August 2005	Expert report in <i>Barnes & Noble v. DDR (Texas)</i>
March 2005	Expert report in <i>Biopart Corporation v. Elan Pharmaceuticals</i>
February 2005	Expert report in <i>Capo v. Dioptrics</i>
February 2005	Expert report in <i>Arthur Stockton v. Fidelity & Deposit</i>
September 2004	Deposition testimony in <i>Her Associates v. Kaiser</i>
August 2004	Deposition testimony in <i>CSR v. Lloyds, et al.</i>
June 2004	Expert report in <i>CSR v. Lloyds, et al.</i>
April 2004	Deposition testimony in <i>General American v. KPMG</i>

March 2004	Expert report in <i>General American v. KPMG</i>
March 2004	Deposition testimony in confidential company valuation for marital dissolution.
February 2004	Expert report in confidential company valuation for marital dissolution.
January 2004	Deposition testimony in <i>Her Associates v. Kaiser</i>
January 2004	Expert report in <i>Her Associates v. Kaiser</i>
March 2003	Expert designation in <i>Creative Artist Network v. Santa Clara County</i>
December 2002	Deposition testimony in <i>Redland Insurance Company v. Anthony Choy and Edward Wolkowitz</i>
November 2002	Expert designation in <i>Academy Tent, et al. Class Action v. American Home Assurance</i>
Sept.–Dec. 2002	Trial testimony in <i>A&J Liquor, et al. Class Action v. State Compensation Insurance Fund</i>
September 2002	Deposition testimony in <i>A&J Liquor, et al. Class Action v. State Compensation Insurance Fund</i>
July 2002	Expert witness report in <i>Creative Artist Network v. Santa Clara County</i>
July 2002	Deposition testimony in <i>Redland Insurance Company v. Anthony Choy and Edward Wolkowitz</i>
June 2002	Expert declaration on insurance company valuation in <i>Redland Insurance Company v. Anthony Choy and Edward Wolkowitz</i>
May 2002	Expert declaration on settlement valuation in <i>Class Action v. Knights of Columbus</i>
Jan.–Feb. 2002	Deposition testimony in <i>A&J Liquor, et al. Class Action v. State Compensation Insurance Fund</i>
December 2001	Deposition testimony in <i>Class Action v. Ford Credit</i>
May 2001	Deposition testimony in <i>A&J Liquor, et al. Class Action v. State Compensation Insurance Fund</i>
April 2001	Deposition testimony in <i>Bar None v. The Duncan Group</i>
April 2001	Deposition testimony in <i>Trigon v. United States</i>
January 2001	Deposition testimony in <i>Heska v. Synbiotics</i>
December 2000	Expert declaration in <i>Trigon v. United States</i>

June 2000	Deposition testimony in <i>A&J Liquor, et al. Class Action v. State Compensation Insurance Fund</i>
May 2000	Deposition testimony in <i>Heska v. Synbiotics</i>
July 1999	Appeared in Federal Court on behalf of Ohio National in <i>James A. Wemer, et al. Class Action v. Ohio National</i> (did not provide testimony)
June 1999	Submitted a report on the valuation and fairness of the proposed settlement in <i>James A. Wemer, et al. Class Action v. Ohio National</i>
January 1999	Identified as an insurance liability and damages expert in <i>Arroyo v. Alexander & Alexander</i>
December 1998	Expert declaration in <i>A&J Liquor, et al. Class Action v. State Compensation Insurance Fund</i>
November 1998	Identified as an economic expert in <i>Class Action v. Ohio National</i> litigation
October 1998	Identified as an insurance expert in <i>Morris v. Fremont Life Insurance Company</i>
September 1998	Expert declaration in <i>Class Action v. State Compensation Insurance Fund</i>
April 1998	Deposition testimony in <i>Handicomp, Inc. v. United States Golf Association</i>
February 1998	Rebuttal expert report in <i>Handicomp, Inc. v. United States Golf Association</i> , coauthored with Ronald C. Curhan
February 1998	Expert declaration in <i>Class Action v. State Compensation Insurance Fund</i>
January 1993	Expert testimony on the likely economic impact of the merger on the hospital's operating expenses and capital expenditures in Federal Trade Commission (FTC) administrative hearings, <i>Proposed Merger of Parkview Hospital and St. Mary Corwin Hospital</i> , Pueblo, CO

PROFESSIONAL MEMBERSHIPS

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