

OFFICER REPORTS

WINTER MEETING REPORT CCS UPDATE

BOARD OF DIRECTORS CANDIDATES

WELCOME TO OUR NEW MEMBERS



FEDERATION OF DEFENSE & CORPORATE COUNSEL



UPCOMING EVENTS CALENDAR



September 15-17, 2024 Corporate Counsel Symposium Windsor Court Hotel, New Orleans, LA



February 23 - 26, 2025 Winter Meeting 2025

Charleston Place Hotel, Charleston, SC

July 27 - August 2, 2025 Annual Meeting 2025

Stein Erikson Lodge & The Chateau at Deer Valley; Park City, UT



February 25-28, 2026 Winter Meeting 2026

J.W. Marriott Desert Ridge Resort, Scottsdale, AZ

July 27 - August 1, 2026 Annual Meeting 2026

Corinthia Hotel, Lisbon, Portugal

FEDERATION OF DEFENSE & CORPORATE COUNSEL



GUIDE TO MEMBER BENEFITS

FDCC Online: www.thefederation.org

Substantive Law Sections: Log into the website and click on the Committees & Sections Tab, and then the "View All Details" Tab to access the 25 Sections. Post blogs, discussion topics, and join with other members whose practice is focused on these areas of the law.

FDCC365 App: Find us in the App or Google Play Store at "FDCC365."

FedSpeaks Podcasts: Listen to any of the over 200 exclusive podcasts by clicking the "Podcasts" tab on the Home Page of the website - or find us on Apple iTunes, Spotify, Stitcher or wherever you get your podcasts.

Friday 5's Weekly Newsletter: Stay up to date with all FDCC and industry developments, upcoming meetings, new members and relevant content in our unique segment of the industry. The 5's are emailed to all members at 10:00am ET each Friday.

Find A Member: Search for members by name, location, and area of practice right from the app or website. Update your professional biography as members and industry members use this search tool to refer cases to FDCC members.

FDCC Roster: The "Blue Book" contains contact Information on all members, the FDCC Bylaws, past award winners, Emeritus Members, geographical index, past and upcoming meetings, and information on the FDCC Foundation.

Knowledge Archives: Find presentations, scholarly research papers and PowerPoint presentations from past meetings by clicking on the "Events" tab on the Home Page of the website and scroll down to "Past Events."

Register for Meetings & Events: Click on the "Register Now" tab for the upcoming event on the right side of the website's Home Page.

Advocacy: The FDCC On Demand tab of the website contains our amicus briefs to SCOTUS, state and federal courts, and our comments to state legislatures on issues to ensure the equitable administration of justice is afforded to all.

Donate to the Foundation: Help support our Barb Currie Diversity Scholarship program, Ladder Down initiative and keynote speakers at our meetings.

Diversity Initiative & Strategic Plan: Read the details on our working initiatives by clicking on the "About FDCC" tab on the Home Page of the website and scroll down to "Diversity Initiative" and "Strategic Plan."

Membership: Nominate candidates for Defense or Corporate Counsel and Insurance Industry Membership by sending an email to our Membership Coordinator: liz@thefederation.org.

Digital Newsroom: Find archive issues of all publications of the Federation on the website.

Get Published: Submit your topical articles, scholarly research and other content for publication in FDCC's "Insights" magazine by sending an email to bernie@thefederation.org.

Find... in the Resources tab of the website

- ...New Member Handbook
- ...Claims Desk Reference
- ...FDCC logos for your website & emails
- ...FDCC Books
- ...FDCC Shop







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For all hyperlinked materials please refer to the electronic version of the Flyer which is available on the FDCC on Demand page of the website.

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FDCC MEETINGS LOOKING BACK

FDCC NEWS

FDCC PILLARS





Craig A. Marvinney

It is hard to believe how fast this FDCC year is moving. We have crossed the fifty-yard line and we are in great shape. Through the

considered work of Co-Chairs
Alison Christian and Bill Vita, our
Corporate Counsel Symposium in
Philadelphia came through not only
as a rousing success, but finished in
the surplus column for the first time
in years. Next, Co-Chairs Micalann
Pepe and Alycen Moss pushed
our Insurance Industry Institute
ahead of budget as well with a very
successful program in New York.

Then came our February Winter Meeting in St. Petersburg. What a great meeting! With Convention Chair Sean Griffin and Program Chair Frank Ramos leaving no detail overlooked, this may have

been the best Winter Meeting in years. Thanks also to their wonderful spouses Wendy-Nia and Ana, respectively (with Ana handling Registration like a veteran pro). The weather was sublime, and the Ramos program superbly helped us understand the idea of "Leading from Where You Are." Sites' recommendation of the beautiful Vinoy hotel right on the marina was spot on! After the President's Reception in the spectacular atrium of the Museum of American Arts & Crafts Movement, we finished strong with the James-Bond-themed Casino Night Gala in the Vinoy ballroom complete with its Chihuly chandelier. The band nailed the James Bond music so well, one may have thought Le Chiffre, Goldfinger, and even Spectre itself were lurking about!

Jimmy Wilkins and his Evolve team along with Steve Embry and his Artificial Intelligence Initiative team combined for a truly great and unique Tech U in April. For the first time, Tech U was held in Miami, Florida, a wholly new locale for the FDCC. Honorable mention goes to the wonderful work of our **Membership Communications** Committee headed by Alan Rutkin and Valerie Kellner, which has raised our Podcasts and Webinar programming to yet another level. For example, the new FedLeads Podcast hosted by Shelly Masters is rife with not-to-be-missed leadership experiences and insights.

Registration is now open for our 2024 Annual Meeting in July in "Majestic Toronto on the Great Lake Ontario." The meeting features the very hotel where

Leadership is our focus this year and our members reflect that leadership. Whether in your firms, the courtrooms in which you appear, or in your communities, you are leaders and will be throughout the rest of your careers.

Queen Elizabeth and her retinue would stay whenever she visited Ontario during her 70+ year reign. Economics favor us with the current Canadian Dollar exchange rate. Chair Marisa Trasatti plans to treat attendees to a blast of a party at the Hockey Hall of Fame, an evening at the beautiful castle, Casa Loma, and a finale in perhaps the most breathtaking ballroom in North America. Toronto's family friendly and clean environs beckon us to a week to remember along Canada's Southern Shore.

Program Chair Tiffany Alexander's rock solid program finishes this FDCC year on the theme of "Inspirational Leadership." Slipped amid Tiffany's work, we have a morning of Artificial Intelligence programming from our AI Initiative Committee designed to keep the FDCC at the forefront of AI teaching. From hands-on learning to law firm management, from use for depositions and research to revealing Deep Fakes in the courtroom, this is cutting edge at its best.

Yes, our Federation, comprised of Defense Lawyers and Defense Leaders, is simply the best! Leadership is our focus this year and our members reflect that leadership. Whether in your firms,

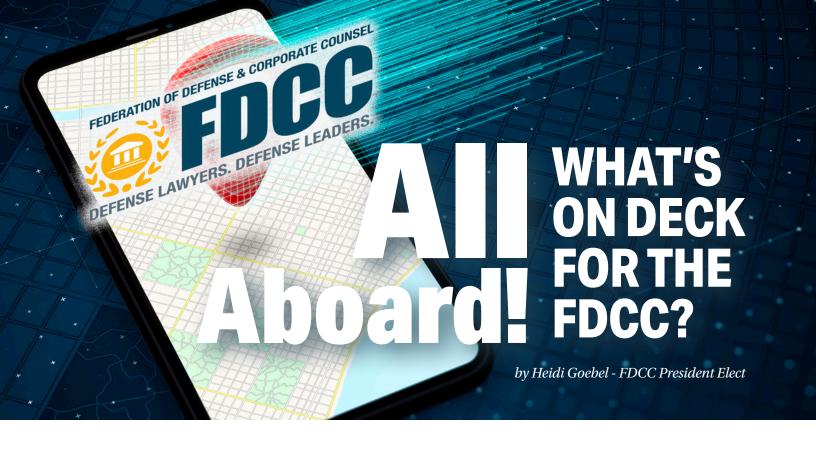
the courtrooms in which you appear, or in your communities, you are leaders and will be throughout the rest of your careers. One of our most illustrious members, USMC General Mike Neil, is our 2024 Lifetime Achievement Awardee. General Neil's heroism in Vietnam as a young man, his founding a leading San Diego Law firm, his putting that aside to don again our nation's uniform and command the Corps' Camp Pendleton as the highest ranking Marine stateside during the Gulf War, and his work to this day as Past-President of the FDCC, all demonstrate his commitment to excellence as a living legend of leadership among

A great federation composed of all of us. A deep symphony of leaders. Whether yours comes silently, suddenly, or superbly, in whatever way or form, leadership comes from within. It comes from your heart, your mind, your training, and is who you are. Together, it is who we are. Our members are looked to as those with analysis and insights endowed with a commitment to excellence. Yes, truly as leaders. You are what makes the FDCC.

Certainly as members in the Federation you should be asking what the FDCC organization can do for you, your work, your career – as that is one of our collective duties. But for those of us rising as leaders within the FDCC itself, we should take inspiration paraphrasing one of leadership's most eloquent calls. President Kennedy's Inaugural Address exhorted us to ask not what the Federation can do for you, but rather, what you can do for our Federation selflessly to continue this great organization's leadership in the years to come.

Please forgive a personal note as this is my last President's Flyer article. I hope our team has risen to meet your expectations in these duties on your behalf. In so many ways thank you for entrusting the Federation's leadership to this guy from Cleveland. Thanks to my four daughters and two step-sons, and yet still, to another. For a time some may have been convinced my name was "Where's Paula!" instead of what my parents named me. To Paula McQueen, thank you. A wise man once observed, "Boy, you outkicked your coverage!" Gratefully, together with all of you, I have.

Craig Marvinney is the President of the FDCC and founding partner of The Marvinney Law Firm in Cleveland, Ohio. Craig can be reached at <u>camarvinney@gmail.com</u>





Heidi Goebel

Unbelievably, we will soon be seeing one another at the Annual Meeting in Toronto. At the conclusion of that meeting, I am slated to step into the

role of President of the organization. I've spent this year planning how to best serve the organization during the 2024-2025 year. The theme I have chosen is "Finding Your Place in the FDCC."

As many of you know, I've spent more than a quarter of my life serving on the Admissions
Committee of the FDCC. It has been such a rewarding experience.
Reviewing the applications of now thousands of amazing, highly skilled attorneys, watching members go the extra mile to find out whether these candidates have that "over and above" quality, and enjoying the humor that gets bandied about when evaluating the application. If you are looking for

some comedic relief on a random workday, please shoot me an email and I can probably get you lined up with a role on the Admissions Committee. Some of my favorite quotes from this group over years include "this candidate is finer than hair on frogs legs," "not only would I not invite this candidate to dinner, but I wouldn't let them park in my driveway," and "he's not flamingly bad, but...."

It was through my role in the Admissions Committee that I found my place in the FDCC. I knew very, very few people when I joined, and at 33 years old, I was the youngest member of the group for a bit. Through the kindness of Cooper Thurber, who invited me to dinner on the night the Admissions Committee meeting was held at the Annual Meeting in Whistler, I started to build my network. This was a crucial pivot point for me, when I started to truly understand that I belonged here.

I know starting with a new organization can be challenging. And, the closeness that develops through our intense commitment to fellowship can be intimidating when you are the new kid on the block. One of the great things about serving on Admissions for such a long time, is that I have seen the applications of so, so many of the members. And I know that each and every one who has been admitted during that time truly belongs here. Those of you who pre-date me in the organization know that this is the place or you wouldn't have remained part of the organization.

With that in mind, I encourage all of you to find your place in the FDCC. Here are my top tips for getting the most out of your membership:

1] Target at least one committee or substantive law group which meets your personality, practice, and goals. We have 25 substantive law sections of various sizes and

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which cover virtually every area encompassed in the practice of civil litigation. Don't see your practice area? Reach out to me and we can see about creating a new substantive law group. We also have 35 administrative committees, which is where the sausage gets made. These are some of the best ways to build strong connections with your fellow FDCC members.

2] Attend a meeting. One of the great things about this organization is we have a meeting for every budget, time restriction, and interest. Our largest and longest meeting is our Annual Meeting - held during the last week of July. These meetings are full of relevant CLE, interesting speakers, and fun activities for the entire family. This

If you are looking for something with a more surgical precision for networking and CLE opportunities, our annual Corporate Counsel Symposium and bi-annual Insurance Industry Institute are the place for you. Two day seminars in metropolitan areas, with CLE focused on the issues facing corporations in litigation and the insurance industry, these seminars are the perfect opportunity to mix and mingle with those at the very top of their craft, learn key tips to better your practice, and enjoy some fantastic food and socializing in the evenings.

3] Raise your hand - literally or figuratively. Our website shows all the Chairs and Vice Chairs of our various committees and sections,

world and elevated it to a part of everyone's life. I mean, is there any motivation bigger for a historically change resistant age group to adapt to virtual calls and social media than a superbug lockdown preventing grandparents from seeing their grandchildren? I submit no. There are a number of ways you can keep abreast of the online opportunities of the FDCC. In less than 3 minutes a week, the FDCC Friday 5's will give you information on upcoming events, cutting edge developments in the law, and tips to make your life better on both the personal and professional fronts. Additionally, the Friday 5's presents an opportunity to publish on topics that are important to you without having to prepare a lengthy, bar

One of the things I love about this organization is that it is made up of people who get things done and that extends to supporting the vibrancy of this organization by delivering the wants of our members.

summer we will be taking over Toronto where in addition to all the city's offerings, we will have the opportunity to hit the ice and take shots on goal at the hockey hall of fame (no ice skates required). At the end of each February/early March we hold our Winter Meeting. These are a bit shorter, and due to school schedules, are a little shorter, and tend to have fewer kids in attendance. They are generally held in warm, sunny places to escape the winter blahs, and have all the same fun activities and fantastic programming.

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as well as the Board of Directors and Officers. There's no better way to get involved AND get involved in a way that meets your personal goals and interests, than asking to be placed in those roles. One of the things I love about this organization is that it is made up of people who get things done and that extends to supporting the vibrancy of this organization by delivering the wants of our members.

4] Keep the FDCC in your virtual world. It seems like attorneys are busier than ever. The pandemic took an already robust virtual

review style article or wait until the publication of a compendium or other compilation of articles. The Friday 5's are sent to not only our entire membership, but also those spouses or significant others who opt in to receive it. We also have a vibrant collection of podcasts and webinars whether you are looking to pick up some tips, or elevate your professional profile. I'm looking forward to seeing more of your smiling faces and hearing your insightful voices soon.

5] Use the network. Whether

you prefer a paper version of the roster or the always-at-your-side convenience of the FDCC365 app or website from your phone or tablet, the FDCC network provides you the strength of having a 1000+ member firm of highly vetted and qualified attorneys throughout North America and beyond. I personally have been able to send my clients to attorneys I know will treat them the way I would in other jurisdictions, get reality checks on how my arguments or strategy will play in different jurisdictions, find exactly the expert I need for a given issue, borrow a conference room, and obtain examples of masterful cross examination testimony on opposing experts from this group. And, I have created some of the most meaningful friendships in my life through this group. When my father passed away two years ago,

the outpouring of support from the FDCC members and their families helped me through that time. If I had to count the number of times I have laughed until I cried with this group, I'd be hard pressed to come up with a number that seems unbelievably improbable.

6] Bring in those who come behind you. I received an invitation to serve as a new member host at my second meeting. In part because I am an extrovert and love hearing about the lives of others, and in part because I am terrible at saying no. I responded to the inquiry, saying I didn't know if I had much to share, but I would be happy to do so if they needed someone. I was paired up with Marisa Trasatti, who is in many respects, the east coast version of me, and we've been friends ever since. I've volunteered nearly every meeting since then to serve as a

new member host, and have had the opportunity to connect with and get to know people I might not otherwise have bumped into in their early meetings. I've developed deep friendships with many of my new members and before I got tied up with so many board obligations, one of my highlights was arranging a dinner on the dine around nights to invite my current and former new members. I'd encourage each of you to engage in this or a similar practice.

I am challenging each and every member to try out at least one of the tips above this coming year and tell me your success stories in "Finding Your Place" in the FDCC.

Heidi Goebel is the President-Elect of the FDCC and named partner at Goebel Anderson, P.C. in Salt Lake City, Utah. Heidi can be reached at <a href="https://hgupt.ncb



LAW SECTIONS

Alternative Dispute Resolution Section Appellate Law Section Civil Rights and Public Entity Liability Class Action an Multidistrict Litigation Commercial Litigation Construction Law Data Breach, Privacy and Cyber Insurance Law Drug, Device and Biotechnology **Employment Practices and Workplace Liability Energy Utilities Law Section** Extra Contractual Liability Section Healthcare Practice Section **Insurance Coverage Section Intellectual Property** International Practice and Law Law Practice Management Section Life, Health and Disability **Premises and Security Liability Product Liability Professional Liability** Property Insurance Toxic Tort and Environmental Law **Transportation Trial Tactics, Practice and Procedures**

COMMITTEES

Admissions Committee **Advisory Team** Amicus and Public Policy Committee **By-Laws and Resolutions Committee Contracts Committee** Sponsorship Committee Convention Review Committee Corporate Counsel Committee **Diversity Committee** Finance & Budget Committee Lifetime Achievement Committee Meeting Sites Committee Membership Development Committee Membership Retention Committee Professional Women's Forum Evolve - Tech U Ladder Down Projects & Objections Committee

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The Federation PHENOMENON

by Howard Merten - FDCC Board Chair



Howard Merten

There is a phenomenon that happens in the FDCC. It has happened to me many times and I was reminded of it at the meeting in St. Petersburg. Roni and

I signed up for fishing and wound up on a boat together with Tiffany Alexander and her husband Steve. I have known Tiff for many years. She and I have been on the Board together for several of those years. I have spoken to her and Steve many times at cocktail parties and events, and the exchanges have always been fun and pleasant. But this excursion was the first time that Roni and I have spent a solid block of one-on-one time with them. We had a blast together, but also got to know them on a deeper level than is possible at a crowded cocktail party. It will not surprise many of you, but both Roni and I had such a great time with them. We walked away and said, "Man, Tiff and Steve are really awesome."

Now, here is the phenomenon part. That has happened to us time and time again in this organization. Every time - and I mean every time - that we have gotten to spend some one-on-one time with FDCC people, including those we know "well" in passing, we have walked away thinking. "Wow, that was awesome." I knew Ed Kaplan for years before we wound up sitting together with him and Maddy and our daughter at a crowded restaurant in Munich. We sat there all night, talking and have since become lifelong friends (unless we are playing cornhole, then all bets are off).

We sat with John and Carolyn at a picnic table in North Carolina (it was an ADTA meeting but I still count it, because you can't get more FDCC than John Woodard). Another opportunity to learn more about amazing people. Roni and Stephanie Finamore bonded for life over the anxiety of their first ziplining experience. One was afraid, the other encouraging. (I am

sworn to secrecy as to which was which). At the 2013 Broadmoor meeting, Roni and I snuck off to Manitou Springs. We sat down for dinner and saw Marc and Karen Young sitting alone as well. "Should we ask them to sit with us?" "I don't know, they might want to have a quiet night together." "Yeah, but if we don't ask them, they might think we are jerks." Well, we asked, they joined us, either out of politeness or desire, we'll never know. Yet again, we discovered amazing people and lifelong friends.

I don't know whether Tiff and Steve will become lifelong friends yet. We hope so. Tiff is an Eagles fan though, so that presents challenges. But hey, the Kreamers and Paula McQueen are Chiefs fans (and Craig by extension, but he lives in Cleveland and needs some source of hope). We worked through (looked past) those allegiances, so there is a way.

These examples do not even scratch the surface of the exhaustive list of the people Roni and I have connected with that have enriched

"Man, Tiff and Steve are really awesome."



The Federation "Phenomenon" in action.

our lives in so many different ways. I chose these because they were a little random. I could tell these same stories about so many others we have met, whether from Roni working Registration or just being more likeable than me, or me working closely with so many talented and dedicated people on conventions, programs, committees, and projects, running Family Fun days, or teaching Mills Gallivan how to tie a bow tie (ok, just checking to see if anyone read this 'til the end).

Like I said, it is a phenomenon. Every Friday 5 ends with these words:

WHY FDCC?

"To be the inspired community of vetted defense counsel, exceptional leaders and even better people."

Even better people. I have found that to be true at every turn. Kudos to our Admissions Committee. Kudos to those who nominate new members. Take advantage of the opportunities presented to all of us by the quality vetting they have already done, and by the talented and engaging people all around us in this organization. Find a way to spend some one-on-one time with someone you have known for years

in passing at cocktail parties, sign up for excursions and hang out with someone new, invite the couple sitting alone to join you. You won't regret it. Even if they are Eagles fans.

Howard Merten is the Chair of the FDCC's Board of Directors and a Past President. Howard is also a partner in Partridge, Snow & Hahn's Providence, Rhode Island office and can be reached at https://html.

2024 FDCC Leadership Candidates

The FDCC is privileged to be guided by an engaged Board of Directors who provide the Federation with their unique and exceptional leadership. The candidates standing for election to the FDCC 2024-2025 Board are noted below. You can read each of their respective Leadership Summaries on the website by clicking on the "2024 Elections" link under the "About FDCC" tab on the Home page. The Candidate's Statement for the Secretary/Treasurer's position is also on the website and follows this article.

The Nominating Committee will be meeting on Thursday, August 1, 2024 in the Algonquin Room of the Fairmont Royal York Hotel in Toronto, ON, in conjunction with the Federation's Annual Meeting. Each FDCC member has an opportunity to meet with the Committee to share their thoughts and comments about each of the candidates standing for election. To select your time to speak before the Nominating Committee, please use the sign-up form on the 2024 Elections page of the website. If you are reading the digital version of the Flyer, you can also click on this link to reserve a time to speak before the Nominating Committee.

In the event you are unable to attend the Annual Meeting or wish to rather provide your confidential comments to the Committee in writing, please email them to President Craig A. Marvinney: camarvinney@gmail.com.

Board Candidates / Senior Directors



Tiffany M. Alexander Nelson Mullins



Alison R. Christian Liberty Mutual Insurance Company



Sean C. Griffin Robinson + Cole



Lee M. Hall Jenkins Fenstermaker, PLLC



R. Jeffrey Kelsey FedEx Corporation



Daniel W. McGrath Hinshaw & Culbertson



Francisco Ramos, Jr. Goldberg Segalla



Heather A. Sanderson Sanderson Law



Marisa Trasatti Sciton, Inc.



Kile T. Turner Norman Wood Kendrick & Turner

www.thefederation.org

Board Candidates / Directors



Carolyn J. Berdzik Goldberg Segalla



Jody E. Briandi Hurwitz & Fine



Charlie T. Frazier, Jr. Alexander Dubose & Jefferson, LLP



Jeffrey M. Guillory First Acceptance Insurance Company



Valerie Kellner Wilson Elser Moskowitz Edelman & Dicker



Shelly Masters
Cokinos | Young



Alycen A. Moss Cozen O'Connor



Micalann C. Pepe Jarburg Wilk



Alan S. Rutkin Rivkin Radler



Scott M. Salter Starnes Davis Florie, LLP



John C. Trimble Lewis Wagner, LLP

Secretary/Treasurer Candidate - Jennifer Johnsen



Jennifer Johnsen Gallivan, White & Boyd, PA

As I sit to write this statement it is the turn of the year. A time when we reflect on the past, take stock of the present and look ahead to the future. It is through this lens that I strive to explain why I wish to serve this organization as an officer.

Reflect and Measure

I attended my first meeting as a member of the FDCC in 2008. It was in beautiful Banff, Canada (a bucket list venue) and Gary and I attended with our sons (age 10 and 6) in tow. To say we were impressed by the experience is an understatement. I remember getting an email and call from my new member host (Elizabeth Lorell) weeks before the meeting, introducing herself and explaining what I could expect at my first meeting. That was a first for me – an organization reaching out with a

personal touch in advance of a meeting to ensure not only that I felt comfortable but valued.

When we arrived in Banff, it was more of the same. Gary and I were given blue name tags as first-time attendees. We met several other "blue taggers" also there with their children and spent time with more seasoned FDCC members with whom we became fast friends. And, of course, the substantive programming and social events were top notch. Everyone went out of their way to make us feel special. I quickly followed the Banff meeting with the Winter Meeting in Kauai, where I was given the opportunity to play a role in the mediation plenary program, and the Annual Meeting at the Homestead in West Virginia. These meetings proved that what I experienced in Banff was not

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an anomaly. Rather, my experiences were the result of deliberate application of the organization's bedrock principles– fellowship, knowledge and justice. And these early experiences form the building blocks of my now 16+ year tenure in the organization.

Before joining the organization, a then-member explained to me what he believed set this organization apart from others:

- 1. it provides members with the opportunity to develop meaningful relationships with fellow members;
- it provides members with opportunities early and often to demonstrate their leadership and substantive skills;
- it provides members with resources to grow as lawyers, professionally and personally;
- it is a meritocracy, providing opportunities to lead based on hard work, demonstrated leadership and commitment; and
- 5. it faces challenges head on and is willing to adapt and change.

As a defense lawyer I was understandably skeptical, but looking back on my personal experiences, I could not agree more. These are the hallmarks of the FDCC, and I have experienced each of them first-hand.

As I reflect over the past 16 years (and the more than 80-year history of the organization), these principles have served us well and continue to be relevant. They have guided us as we consider the value proposition of the organization for our members – whether through the storm of Covid-19 when interactions were limited to virtual meetings and happy hours; when faced with hard decisions about what programming to keep, reinvent, retire or create; or handling the changing landscape of law firm and company economics in a post-pandemic world. They will continue to guide us as we look to the future.

So where are we today as an organization? We have 1398 members, consisting of 1064 defense counsel members, 242 corporate counsel and industry members, and 92 members in special categories (i.e., Emeritus, Special Active, Special Retired). Our Board is engaged. Our Sections are active. Our programming is timely, innovative and adds value for members. Our webinars and podcasts are popular, experiencing high traffic from members and non-members, and are providing enhanced visibility for our members. The Friday-5s are a resounding success. Our profile as an organization is elevated. We continue to recruit high quality members. We are expanding our diversity efforts.

Looking to the Future: The "Blue Tag Experience"

What I experienced in 2008 is what I want every FDCC member to experience long after their first meeting. That "Blue Tag Experience" is like receiving the iconic Tiffany blue box – it makes you feel special, and you know something great is inside. This is how we set the FDCC apart from other defense organizations. As we look ahead, my goal is to create the Blue Tag Experience for everyone. My vision to achieve this goal it is simple: (1) focus on what has made the organization great – vetted, quality members; unmatched, innovative programming; premiere (and fun) events that provide opportunities to develop meaningful relationships; (2) enhance ROI for all members; and (3) ensure the decisions we make are in line with the FDCC's strategic plan.

For example, we know one of the most effective ways to keep members engaged is to provide them with opportunities to showcase their knowledge. We have done this successfully through our Annual and Winter Meetings, I-3, CCS, Fed Tech U and other stellar programming. We do CLE well and need to continue to excel in this area. We can (and should) be innovative in our approach, but we cannot lose sight of the importance of this aspect of the organization. Our members are at the top of their game, and they expect and deserve programming that will challenge them. Our programming accomplishes more than just passing on knowledge, it creates opportunities for members to highlight their knowledge and build relationships with other members. In time, these relationships inevitably result in referrals and networks that enhance ROI. This is just one example of how we perpetuate the FDCC's iconic Blue Tag Experience.

In closing, I am humbled and honored to stand for Secretary/Treasurer. Not only has this organization made me a better lawyer, it has given me the opportunity to build meaningful professional and personal relationships. Needless to say, I cherish my membership in the FDCC and thank all of you (you know who you are) who helped me along the way. There really are too many of you to mention here and I fear if I tried to list you all I would miss someone. This fact alone is indicative of what the FDCC is all about – an inspired community of vetted defense counsel, exceptional leaders, and even better people.

Jennifer Johnsen is a Partner with Gallivan, White & Boyd, P.A. and a Senior Director of the FDCC. Jennifer can be reached at ijohnsen@gwblawfirm.com.



by Marisa A. Trasatti - Convention Chair and Tiffany Alexander - Pogram Chair



Marisa A. Trasatti



Tiffany Alexander

Join the Federation for its first-ever meeting in Toronto, Ontario where we will venture into the royal allure of Canada for the 2024 Annual Meeting from July 28 – August 3. As Canada's most populous city and one of the most multicultural and cosmopolitan places in the world, there will be endless opportunities for experiences and

discovery. Toronto is a prominent center for music, theatre, arts, sports, and culture. So, there will be something for everyone in our FDCC family. We are designing our programs and excursions to let you take advantage of everything that Toronto has to offer—indoors and outdoors. As our Convention theme

implies, you will feel like royalty during your stay at The Fairmont Royal York- the residence of choice by the Late Queen Elizabeth II.

Along the edge of Great Lake Ontario, and surrounded by Toronto's most iconic sites, stands the Fairmont Royal York Hotel. It is considered one of Canada's grandest railway hotels - a national landmark and an icon of Canadian history and architecture. Directly west of the hotel, you will see the CN Tower rising prominently among its surroundings. Meanwhile, on the southern side, sits the calm dark-blue water of Lake Ontario. It has been coined the most luxurious hotel in Toronto and a gateway to the quintessential Toronto experience. From its rooftop beehives to the library bar to the indoor/outdoor pool amenities, and beyond, The Royal York hotel will not disappoint.

Featured Events & Select Excursions

Casa Loma Castle Casa Loma is a Gothic Revival castle-style mansion and garden in midtown Toronto that is now a historic house museum. It was designed from 1911 to 1914 by E.J. Lennox, a notable architect who planned several other Toronto landmarks. Explore the castle's three floors and numerous exhibits. The "Oak Room" is considered the most decorated room in the house and a must-see spectacle. Casa Loma is the perfect setting for our special occasion on Tuesday, July 30, 2024.

Hockey Hall of Fame Museum

Toronto's Hockey Hall of Fame museum is a tribute to the history of ice hockey. It holds 15 exhibit areas showcasing players, teams, NHL records, memorabilia, and



Day Trip to Niagara Falls

NHL trophies, including the Stanley Cup. The Hockey Hall of Fame was established in 1943 under the leadership of James T. Sutherland and is now located inside Brookfield Place (and a historic Bank of Montreal building). The myriad of exhibits, interactives, theatres, sculptures, and history within the Hockey Hall of Fame will be a memorable experience. So, don your favorite team jersey—hockey or not—and let's gather on Thursday, August 1 for the Theme Party!

Over the Falls Tour

Experience the spectacular sights and sounds of Niagara Falls at a leisurely pace during a well-organized and comprehensive guided tour.

Royal Ontario Museum

Enjoy one of the largest museums in North America (and largest in Canada) which showcases art, culture, and nature from around the world and across the ages.

In addition to the list above, there are many other wonderful indoor and outdoor excursions planned for the entire family to enjoy, which you can find in the <u>Annual Meeting brochure!</u> We are very excited about what we are offering at this year's Annual Meeting in terms of convention activities and program planning. *The royal allure awaits us at Majestic Toronto on the Great Lake Ontario*.

Now, let's preview the exciting programming that we have planned for you! The theme of our program is "Reaching New Heights in Leadership, the Law and in Life." Just as the beautiful city of Toronto offers a myriad of diverse and interesting activities and opportunity, so will our program. We have put together a jampacked program of innovative and important presentations to help you navigate the ever-changing landscape of the law, business, and technology. Our program will leave you inspired and poised to lead your organization through whatever may come.

Monday, July 29, 2024 Section Programming

- EVOLVE Workshop
- Mediation Series: The Landing and Preventative Maintenance -Closing the Deal
- AI Hands-on Workshop to Start Using AI in Your Practice

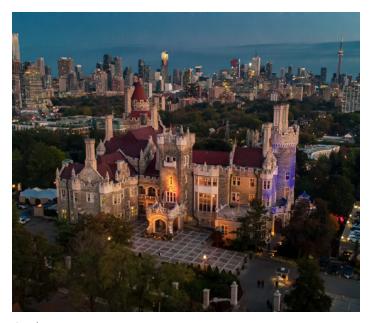


Royal Ontario Museum



The Cliffs on Lake Ontario

We are very excited about what we are offering at this year's Annual Meeting in terms of convention activities and program planning.





Castle Loma

NHL Hall of Fame

Keynote Speaker, Michael Smerconish, Smerconish.com

Using the perfect blend of analysis and humor, Michael Smerconish delivers an engaging, thought-provoking, and balanced dialogue on today's political arena. Michael is a contributor and host of the CNN weekly show, "Smerconish", and host of the popular Smerconish Podcast, for Independent Minds, where he hosts spirited discussions of government, politics, and current events without predictable left/right bias.

Tuesday, July 30, 2024 Section Programming

- Arbitration: Trends & Strategies for Success
- PFAS: From "Forever" Chemicals to Forever Litigation

Plenary Session

- AI: Threats and Opportunities of Generative AI in the Practice
 - o Stephen Embry, Embry Law
 - Dr. Maura Grossman, School of Computer Science University of Waterloo, Waterloo
- Diversity & Inclusion Efforts After Harvard
 - o Mohamad Bakry
 - o Atoyia Harris, Special Employment Law Counsel, Proskauer Rose
- Building a Culture that WORKS For Your Organization
 - o Marisa Trasati, Sciton Inc.
 - o Aaron Burton, Chief Executive Officer, Sciton, Inc.

Wednesday, July 31, 2024 FDCC Inaugural Al Workshop

- Frank Ramos
- Steve Embry

Thursday, August 1, 2024

- Anatomy of an Attorney's Fee Award
- Employment Law Issues In An
 Ever Evolving Legal Landscape
 What You Need To Know To
 Advise And Protect Your Clients
- Rising Above Finding Coverage and Litigating Civil Liability for Criminal Activity.
- Litigation in the US vs. Canada: Cross-Border Challenges and Opportunities

- Jury Selection LIVE
 - o Ann Trivet, Keating, Bucklin & McCormack
 - o Stuart Simon, AJC
 - o Miranda Soto, Buchanan Ingersoll & Rooney
 - o Thomas L. Miller, Keating, Bucklin & McCormack
 - o Monté L. Williams, Steptoe & Johnson
 - o Edward B. Ruff, Pretzel & Stouffer
- State of the Bench: US and Canada
 - Honorable Cynthia M. Rufe, United States District Court for the Eastern District of Pennsylvania
 - Honorable Clayton J. Conlan, Superior Court of Justice of Ontario

Friday, August 2, 2024

- Discovery Terrorism
- Leading the Charge: Establishing, Building, and Practicing in Specialized Business Courts
- Your Legal Malpractice Policy: Knowing What Is (And is Not) Covered to Lead and Protect Your Firm

Closing Keynote: Chris Davis Profile of Resilience

Please join us in Toronto for a Great Annual Meeting!



Distillery District



Queens Park

Tiffany Alexander is the Program Chair for the Toronto Annual Meeting and a Senior Director on the FDCC's Board of Directors. Tiffany is a partner in Nelson Mullins' Pennsylvania office and can be contacted at tiffany.alexander@nelsonmullins.com.



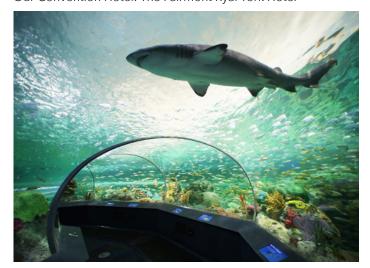
Toronto Blue Jays Baseball



UPLA Trampoline Park



Our Convention Hotel: The Fairmont Ryal York Hotel



Ripley's Adventure Aquarium



Toronto Island



Do you want to learn about the most pressing challenges keeping corporate counsel up at night? Would you like to hear solutions enabling you and your businesses to stay ahead of the curve? Does fresh chicory coffee with dulcet beignets or a savory authentic po-boy whet your tastebuds? Then, we look forward to seeing you at the 2024 Corporate Counsel Symposium in New Orleans, Louisiana at the Windsor Court hotel from September 15-17, 2024.

From the Federation of Defense and Corporate Counsel, we are excited to bring you this must-see program focused on solving hard problems. Thanks to the FDCC's talent bench and some local guests, we will hear from experienced, innovative, and forward-thinking peers, judges and business leaders who will share their unique insight and experience on these topics and more:

- Approaches When Dealing with Unusual Venues
- Managing Risk: From Procuring Insurance to Navigating Claims
- Developments in Employment Law
- DEI in the Workplace After SFFA
- Successfully Working with Boards of Directors
- Lawyering with Gen AI
- Mentoring in Order to Retain Legal Teams
- Rules and Policies Impacting Civil Litigation Landscape
- Preventing, Noticing and Addressing Burn Out
- Trial Strategies in Avoiding Runaway Verdicts
- Wearing the Many Hats of Corporate Counsel

For more dynamic presentations and robust discussions, we will exclusively use a one-on-one or panel format without powerpoint slides. Outside







Shelly Ma

Valerie Kellner

of these informative panels, you will find plenty of opportunities to see old friends, make new ones, and experience the camaraderie and local adventure that makes the FDCC second to none.

Come explore NOLA, this year's home for CCS, which offers an abundance of history, experience, and culinary indulgence. Originally home to the Woodland and Mississippian Native Americans, and later a Spanish colony, New Orleans continues to boast its French influence. Take to "the Vieux Carre" or "French Quarter," offering historic museums, the French Market, the original Café du Monde, and ghost tours. Our dine-arounds, a staple of the FDCC community, offer a mélange of gastronomical delights whether your tastes gravitate towards Creole, Cajun, or Southern. Take comfort at The Windsor Court, "a haven for those who seek the luxuries of revelry, comfort, and beauty through unique experiences in the magical city of New Orleans." This Forbes Travel Guide Four-Star hotel features a more modern vibe without

sacrificing its Old World-inspired roots.

There are numerous explanations for why New Orleans is called "The Big Easy." Perhaps, it's the dance hall where legendary cornet player, Buddy Bolden, occasionally performed, solidifying the region as an emerging and thriving jazz music city. What about New Orleans showing a relaxed approach to Prohibition? Or maybe it was New Orleans gossip columnist, Betty Guillaud, who coined this phrase in the late 1960s when comparing it to the hustle and bustle of "the Big Apple." While we may not solve this hard problem, you can be sure that you'll leave the 2024 Corporate Counsel Symposium in the Big Easy ready to solve those problems faced by our clients, companies, and firms.

April Berman is Senior Vice President and Deputy General Counsel with Asurion. Contact her at: April.Berman@asurion.com.

Valerie Kellner is an Attorney with Wilson Elser Moskowitz Edelman & Dicker. Contact her at: <u>Valerie.Kellner@wilsonelser.com</u>.

Shelly Masters is a Principal at Cokinos | Young. Contact her at: SMasters@cokinoslaw.com.

For more dynamic presentations and robust discussions, we will exclusively use a one-on-one or panel format without powerpoint slides.

WALKING IN SUNSHINE THE 2024 WINTER MEETING

by Sean Griffin - Convention Chair



Sean Griffin

As I wrote the brochure for the 2024 Winter Meeting, I was sitting with a glass of champagne at the Vinoy Resort, watching birds fly over the North Yacht Basin in sunny

72-degree weather. As I write this article summarizing the meeting, I'm sipping a glass of champagne at Bradley International Airport in Hartford, Connecticut, where it's 45 degrees and raining. Life comes at you fast.

Which makes it all the more important to savor the times you get to walk in the sunshine, as we did at the FDCC 2024 Winter Meeting. 280 members attended this meeting - more than any Winter or Annual Meeting since well before the pandemic. In total, 456 people joined us in St. Petersburg -- more than any other Winter Meeting in the past five years. The Convention Team offers its heartfelt thanks to the many people who took time out of their busy schedules to support and attend the Winter Meeting. We especially thank the dozens of new members who were willing take time away from

work, put on the blue tag, and give us a chance to show how great the FDCC can be.

The Membership Development Committee unofficially kicked off our meeting with Federation Express, a four-hour program designed to show new members what the FDCC is all about. Brilliantly led by Jill Rice, Robert Lockwood, William Toles, and Thayla Bohn, our new members got had first class CLE from Kendra Jones, Jamie Jones, and Micalann Pepe, followed by lunch and a great bonding experience.

From there, we went outside to the Vinoy Esplanade, where we finally got to greet each other and properly begin the festivities.

Monday's program featured a talk from Florida Supreme Court Justice John D. Couriel. Then United States District Court Judge Dan Aaron Polster, who presided pver the Opioid Litigation MDL in Cleveland, shared his thoughts on the MDL, including significant decisions, outcomes, and lessons learned. The day's plenary session concluded with litigation management tips from Kyle

Dreyer of Baylor University. (Some members went next door for our complimentary headshots.)

Monday night, we held our long-awaited President's Reception at the five-story, 137,000 square foot Museum of the American Arts and Crafts Movement. The museum's founder was in attendance and told us the FDCC was the biggest group the museum ever hosted. Guests surveyed the beautiful arts and crafts and many of you picked up mementos from the gift shop. We enjoyed a memorable dinner in a beautiful setting along with drinks, music, and fellowship.

Tuesday, we enjoyed plenary sessions focused on leadership, starting with a panel of FDCC members telling us how they lead their law firms, companies, and communities in these challenging times. Then, a tech-savvy panel of industry experts described the world of information about plaintiffs available to you, from cellphone data, vehicle data, health and social apps, and more.

Tuesday night, the FDCC held a Diversity Dinner at the Carter G.

In total, 456 people joined us in St. Petersburg -- more than any other Winter Meeting in the past five years.

FDCC MEETINGS - Looking Back

Woodson Museum, organized marvelously by Kelly Brilleaux and Dafney Stokes. Our members perused the art and conducted lively discussions with one another. One new member remarked on how the dinner demonstrated the FDCC's commitment to diversity, and we will continue to work to honor that trust.

After dinner, an unprecedented 200 attendees came to the Dessert Party outdoors in the Vinoy Tea Garden. It was probably the promise of cookies.

Wednesday morning, an all-star mediation panel discussed mediation techniques and negotiation strategies. After the business meeting, we had the honor of welcoming New York City firefighter and 9/11 responder Lt. Joe Torillo, who enraptured us all with his story of being buried twice but surviving the collapse of the World Trade Center towers.

Afterward, we went out on the town. We held the FDCC's Inaugural FDCC Shuffleboard Tournament at the St. Petersburg Shuffleboard Club, and some of us went to the beach. Others went kayaking, fishing, or took to the skies in a helicopter tour. And many visited St. Petersburg Pier or toured some of the city's many museums.

And to close things out, we came together to bond . . . James Bond. (Sip a martini to celebrate the last time I get to make that joke). We donned our finest 007-inspired wear and went to Casino "Vinoyale" for some terrific food, music, and drinks. Then we tried our luck at roulette, craps, poker, and blackjack, with prizes for the big winners. Most importantly, we all got together one more time as an FDCC family, to meet and greet each other. Then we departed from St. Petersburg with love.

Thank you to all of our speakers, hosts, sponsors, and attendees. Thanks to Program Chair Frank Ramos, who knocked it out of the park with a terrific program and took the meeting to new heights, and to Registration Chair/Secret Weapon Ana Ramos, who kept so many things organized behind the scenes. Thanks to the Headquarters team - Bernie Heinze, Martha Heinze, and Kimberly Cavender, for putting in 18 months of work to make these four days run seamlessly. And special thanks to President Craig Marvinney and First Lady Paula McQueen for the honor of organizing this spectacular Winter Meeting

Sean Griffin is a partner of Robinson + Cole in Washington, D.C.; a Senior Director of the Board of the FDCC and served as Convention Chair of the Winter Meeting. Sean can be reached at sgriffin@rc.com..





















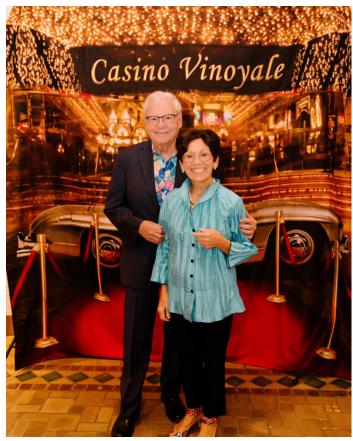
















































THE FEDSERVES COMMITTEE HAS BEEN BUSY THIS YEAR!

by Co-Chairs Lynne Ingram and Vicki Smith





Lynne Ingram

Vicki Smith

Since the Annual Meeting, FedServes has coordinated two virtual drives benefitting One Warm Coat and The Joy of Sox

At the 2023 Annual Meeting, we organized an event where attendees and their families assembled fleece blankets to donate to the local

children's hospital. We were able to donate 40 blankets. The event had much support by our Federation Family.



One Warm Coat's mission is to provide free coats to children and adults in need while promoting volunteerism and environmental sustainability. This drive resulted in a \$425 cash donation to this worthwhile cause.



Founded in 2010, The Joy of Sox has collected and distributed hundreds of thousands of new socks to people experiencing homelessness in the Philadelphia area and across the United States. Our Federation Family purchased **more than 4,000 pairs of socks** from an Amazon Wish List to support this drive. The organization was absolutely thrilled to receive this donation!







At the 2024 Winter Meeting, we joined with Federation Express to host an event where FDCC members wrote Thinking of You cards to approximately 40 seniors residing

at the nearby nonprofit Concordia Manor residential facility. We delivered the cards along with small gifts for each of the residents. The Activities Coordinator was overjoyed and looking forward to sharing the thoughtful notes and gifts with the residents.



FedServes was formed in 2020 to further reflect the FDCC's commitment to civil justice and fellowship, and is dedicated to philanthropy and charitable works. The mission of FedServes is to touch the lives of people who live in the communities where our meetings are held, and leave a positive mark through our efforts. FedServes also strives to affect change in the

communities where we all live and work, through ongoing virtual opportunities.

Civil justice and fellowship are at the core of who the FDCC is, and what better way to celebrate these principles than through FedServes!

If you are interested in joining FedServes or if you have an idea for a community service project, please reach out to FedServes Co-Chairs, Lynne Ingram and Vicki Smith.

Lynne is a member of Campbell Conroy's Philadelphia office and can be reached at lingram@campbell-trial-lawyers.com. Vicki is a partner in Chinn Smith's Lake Oswego, Oregon office and can be reached at smith@csw-law.com.

EVOLVE COMMITTEE PRESENTS

FED TECH U EACH YEAR TO BENEFIT FDCC MEMBERS

by Jimmy Wilkins



Jimmy Wilkin

The FDCC is known for being the inspired community of vetted defense counsel and exceptional leaders with members who have achieved high levels of distinction in the legal profession across the United States and worldwide. The Federation has always been known for providing

cutting-edge educational sessions to provide value to its distinguished members. One of the core principles of the FDCC is to provide members with access to unique opportunities to enhance their skills through innovative meetings and knowledge sharing among members.

Fed Tech U is a unique technology workshop for lawyers that the Evolve Committee puts on every year. As defense lawyers and defense leaders, FDCC members have to always be aware of ways to better tell the client's story through the use of technology. Our approach to technology as defense leaders can significantly aid our mission of effectively advocating for our clients. Further, as defense lawyers and defense leaders, FDCC members greatly benefit from using technology and technology tools to become more organized in law practice. Using technology as an organizational tool can make for a highly effective lawyer and advocate.

For the 2024 year, Fed Tech U was held in beautiful Miami, Florida, at the headquarters of LIT SOFTWARE from April 19-21, 2024. From all reports and feedback received, it was another success.

...and heartfelt thanks to our amazing faculty who, along

with FedTechU Chair Jimmy Wilkins continue to share their knowledge and experience to further enhance the opportunities for the rest of us:

- Rich Dukes
 - Turner Padget, Charleston, SC
- John Delany Marshall Dennehey, Philadelphia, PA
- <u>Dan McCune</u> Childs McCune, Denver, CO
- <u>Bob Christie</u>
 Christie Law Group, Seattle, WA
- Frank Ramos Goldberg Segalla, Miami, FL
- Paul Schumacher
 DMC, Strongsville, OH
- <u>Stephen Embry</u>
 EmbryLaw, Louisville, KY
- <u>Ned Currie</u>
 Currie Johnson & Myers, P.A., Madison, MS

The Fed Tech U program discusses the best software and apps available. Fed Tech U primarily discusses the native tools available on the iPad Pro and the benefits of using the native tools with the iPad Pro. Fed Tech U also focuses on creating beautiful presentation slides. The program also provides instruction on the TrialPad app that can be used to engage a jury, client, mediator, or other audience effectively. Fed Tech U also allows attendees to learn new tech tricks and watch other excellent lawyers use the tech to present case themes and theories. Each attendee utilizes the tech to make a presentation at the session. The Evolve Committee also realizes there is value in using tech to become more

Congratulations to the FDCC's newest class of

FDCC MASTER TECHNOLOGY ADVOCATES

- Andrew Simpson
 Andrew C. Simpson, P.C., Christiansted,
 Virgin Islands
- <u>Jarrod White</u> Frazier Greene, Mobile AL
- <u>Heidi Barcus</u>
 Lewis Thomason, Knoxville, TN
- <u>Christian Steinmetz</u> Gannam, Gnann & Steinments, Savannah, GA
- Megan Coluccio Christie Law Group, Seattle, WA
- <u>Clint Cox</u> Cox, PLLC, Dallas, TX
- <u>Cam Rasco</u> Childs McCune, Denver, CO



Fed Tech U 2024

organized. The program also discusses using various note-taking and PDF annotation apps to become more organized in law practice. Fed Tech U also addresses the use of anatomy illustration apps as visual aids in explaining human anatomy at issue in a lawsuit. The course also addresses using the Transcript Pad app to organize testimony and issues across multiple depositions in a case.

Fed Tech U features multiple members of the Evolve Committee assisting the attendees and coaching them on the use of the technology. Additionally, before attending Fed Tech U, attendees receive instructional videos tailored to utilizing the tech at the highest levels. Further, Brett Burney of Burney Consultants also presented at Fed Tech U. Brett frequently lectures on using an iPad Pro to do more than play games. Brett has given dozens of highly engaged CLE-approved iPad presentation courses nationwide. These courses demonstrate to lawyers how an iPad can be an effective and valuable part of daily law practice. He also provided custom iPad training sessions for lawyers, law firms, and corporate legal departments. Tara Cheever also

presented at Fed Tech U. Tara is the co-founder and chief product officer at LIT SOFTWARE, a company that creates innovative and easy-to-use software that equips lawyers with the tools to be successful in law practice, including apps such as TrialPad, TranscriptPad, and DocReviewPad.

In conclusion, Fed Tech U is an excellent weekend two-day technology workshop beginning on Friday that will no doubt enhance the lawyer's ability to tell the client's story through the use of technology. There is something to be learned by all attendees, no matter the technological skill level. Attendees also gain a better appreciation and understanding of how the various technology tools can significantly enhance the lawyer's ability to be more organized and, thus, more effective in law practice. If you missed out on being with us this year, please consider joining us in 2025.

Jimmy Wilkins is a Vice-Chair of the FDCC's Evolve Committee and Chair of Fed Tech U Committee and a member of Watkins & Eager's Jackson, Mississippi office. Jimmy can be reached at jwilkins@watkinseager.com.

FDCC members have to always be aware of ways to better tell the client's story through the use of technology.

MIKE NEIL HONORED

WITH FDCC LIFETIME ACHIEVEMENT AWARD

by Todd A. Roberts



Todd A. Roberts

At the very outset of the Winter Meeting in St. Petersburg, Florida Brigadier General Michael I. Neil (aka, "The General") was presented with

the FDCC Lifetime Achievement Award based on the many amazing accomplishments of his life and legal career. To no one's surprise a standing ovation followed.

It is the Federation's intent with the Lifetime Achievements Award to honor extraordinary individuals who are above and beyond in every facet of their professional and personal life and recognized as a giant in their legal community, the Federation, and the greater community at large. The recipient must embody the core values of our Federationknowledge, justice, professionalism, and fellowship. The Lifetime **Achievement Committee measures** these criteria against not only all other exceptional lawyers within the Federation, but also those outside of it. This is not intended to be an award exclusively for Past-Presidents although many are no doubt deserving. Each year the Lifetime Achievement Award Committee considers a number of nominations submitted from the membership at large.

The General graduated from San Diego State University in 1962 with



Left to Right: Clarke Hudson and "The General"

a B.A. degree in Pre-Law, and an L.L.B. degree from Boalt Hall School of Law, University of California at Berkeley, in 1966. Upon graduating from law school, he committed to become an Officer in the Marine Corps, but only on the condition that he be a combat soldier and not a lawyer setting behind a desk.

After completion of Officer Candidate School at Quantico, VA, Mike was commissioned a second lieutenant and upon graduation ordered to the 1st Marine Division for duty in the Republic of Vietnam. He served as a platoon commander with Company D, 15th Battalion, 7th Marines in Vietnam and was the recipient of the Purple Heart for wounds received in action. He later received the Navy Cross as a result of his courage and heroism in combat which is the highest honor given by the U. S. Military second only to the Medal of Honor. It is certainly no surprise to any of us that Mike Neil answered the call of duty when his country needed him most.

Perhaps as much as we identify the General as a Marine, he is also a proud Irishman, with both parents being of Irish descent. Mike served as President of the Friendly Sons of St. Patrick, and was named Irishman of the Year by the Nice



The General's dedication to the Federation and its members has been nearly limitless.

Guys. Many Federation members have shared an Irish Whiskey and friendly conservation with The General over the years.

Mike is the founder of the prestigious San Diego, California law firm of Neil Dymott Hudson, where he was the senior attorney

and a accomplished trial lawyer. In the course of his storied career Mike tried over 140 cases to verdict. He holds the rank of Diplomate in ABOTA, and is one of only twenty attorneys in San Diego to be inducted into the American College of Trial Lawyers. Mike has served as the President of the Association of Defense Counsel of Southern California, once served as a director of the San Diego Padres, and was instrumental in the effort to bring PETCO Park, the Padres baseball stadium, to downtown San Diego.

Remarkably, in 1990, at the age of 50, Mike was called to active duty again and took command of Camp Pendleton during Operation Desert Shield, which would be Camp Pendleton's largest mobilization since the Vietnam War.

To most of us, Mike is larger than life and no doubt could be an intimidating force as an advocate if he chose to do so. But Mike is

known for treating his adversaries with dignity and respect, and was recognized as such by being the recipient of the San Diego Bar Association's Daniel T. Broderick Award for Civility, Integrity and Professionalism in trial advocacy.

Mike joined the Federation in 1986 and has continuously served us at the highest level since. He was the Convention Chair with his wife Jan for our Annual Meeting in San Diego in 2005, when then President Jean Lawlor made her appearance on the USS Midway by helicopter. It was during this Convention that Mike's love for San Diego was on full display to our members.

Shortly thereafter, Mike was nominated to be FDCC Secretary Treasurer, then served as President of the Federation from 2011-2012, and later as Chairman of the Board. To this day he attends the Federation Board meetings as a Past President to share his wisdom and offer his guidance and advice.

Federation members never forget the first time they met Mike and Jan, with their huge hearts, sincerity and generosity. The General's dedication to the Federation and its members has been nearly limitless. The General is a dedicated and loving husband, father of two children, Megan and Sean, and is a grandfather.

Presenting the General with the Lifetime Achievement Award was among the greatest honors of my life. Mike Neil is an American Hero—and he is our hero. I am proud to call Mike a friend--as are countless others in the Federation. Congratulations Mike Neil! Hoorah!

Todd Roberts is a partner and chairperson of Ropers Majewski in Menlo Park, California, FDCC member and past member of the FDCC Board of Directors. Todd can be reached at todd.roberts@ropers.com

Diverse Members Diverse Experiences

by Frank Ramos



Frank Ramos

In the current environment where diversity efforts are under attack and where advances in diversity and inclusion have been challenged, reduced,

or outright lost, it bears repeating why our differences make us stronger.

Our clients are diverse

We serve diverse clients with diverse needs. A diverse team better serves those needs.

• Our juries are diverse

Citizen volunteers from all backgrounds and walks of life comprise our long-established jury system. A diverse trial team relates to them

better.

Our challenges are diverse

Technology, globalization, and a host of other factors have fractionalized and multiplied the problems we and our clients face. Different opinions, views, and perspectives better address these challenges.

• Our stories are diverse

Our nation is one of the most diverse in the world. Everyone has a story. Sharing them enriches us all.

• The future is diverse

Trend lines are showing we as a country are growing more diverse, not less. We should embrace this, not shun it.

We are lawyers, and as such, our professional responsibility extends beyond simply serving our clients and includes serving the profession, the bar, and our communities. That service includes

making

every person – every lawyer, every judge, every juror - anyone that this profession touches – feel welcome and part of the process. And many of these individuals are diverse. We took an oath to be the best lawyers we can be. That oath demands we treat everyone, irrespective of creed or belief, race or nationality, background or origin, sexual orientation or identity, with the respect, concern, and care they deserve. Diversity means standing up for what's right and doing and saying the things required of us as privileged members of this profession.

The Diversity Committee is here to serve you, our members, and if you have any questions, thoughts, or ideas, please reach out to our chair, Frank Ramos at framos@goldbergsegalla.com or to Sean Griffin at SGriffin@rc.com.

Frank Ramos is a Partner at Goldberg Segalla in Miami, FL. Contact him at: framos@goldbergsegalla.com.

Ways to Support Your Well-Being in Business Development

by Claire E. Parsons



Most lawyers want to engage in more business development activities, but it can be so hard to get started. When push comes to shove, it may be more immediately beneficial to spend time billing hours than to take on nonbillable work. When these goals are satisfied, there may not be much time and energy left. With so many reminders for us to "take time for ourselves," lawyers may feel guilty for using what little free time we have on

Claire E. Parsons

things like networking, marketing, or other business development.

For a long time, these kinds of thoughts as well as personal doubts about whether I, as an introvert, could ever be good at business development, kept me from trying. Eventually, though, I got started and found success. I also happen to be a mindfulness and compassion teacher in addition to practicing law, so I have been committed all along to my own well-being while doing so. Here are the strategies that have worked for me.



1. Tap into meaning

Business development takes time. Though your pace and means may change over the years, business development efforts may span your career. How do you stay motivated when results are deferred, or setbacks occur? Connecting to my purpose has been my touchstone. I keep my values, and the value I could offer clients, front and center in all my business development efforts. This helps me engage in these efforts guided by a strong sense of meaning which energizes and renews my efforts.



2. Use your superpower

If you want to do something often, your best bet is to make it easy. In this regard, it makes sense to lean into whatever business development skill is strongest for you. Technology and social media have given lawyers so many options to connect with people and spread the message about our services. You could talk on a podcast ("Fed Speaks" offer multiple opportunities), meet people for coffee, post on social media, or write. You don't have to do all of these at once. Pick the one that is the easiest for you to do and get started.



3. Have fun

It's a shame that you rarely hear people remind lawyers to "have fun." If you want to develop business and support your own well-being, make it fun. You'll be a better networker if you smile. Your articles or social media posts will get more engagement if you sometimes make people laugh. You will enjoy presenting seminars about boring legal topics if your passion shows why the topic is not boring at all. If business development is a grind, you won't want to do it. Tap into your creativity, sense of humor, and humanity to do it your way, express yourself, and have fun.

I keep my values, and the value I could offer clients, front and center in all my business development efforts.

4. Take advantage of active rest.

Now, you may be thinking "that's all great but I still need time to just rest." Of course, I won't argue with that. There is, however, a thing called "active rest." This is not a mind game; it's real. Active rest happens when you do something but change the task. When I write a blog or social media post, it is work but one that employs skills that I don't get to use in law practice. In this way, I rest my lawyer brain and activate my creativity and openness. Do I still sometimes truly need to do nothing? Absolutely, but if I vary my activities, I can rest without doing nothing all the time.

5. Collaborate

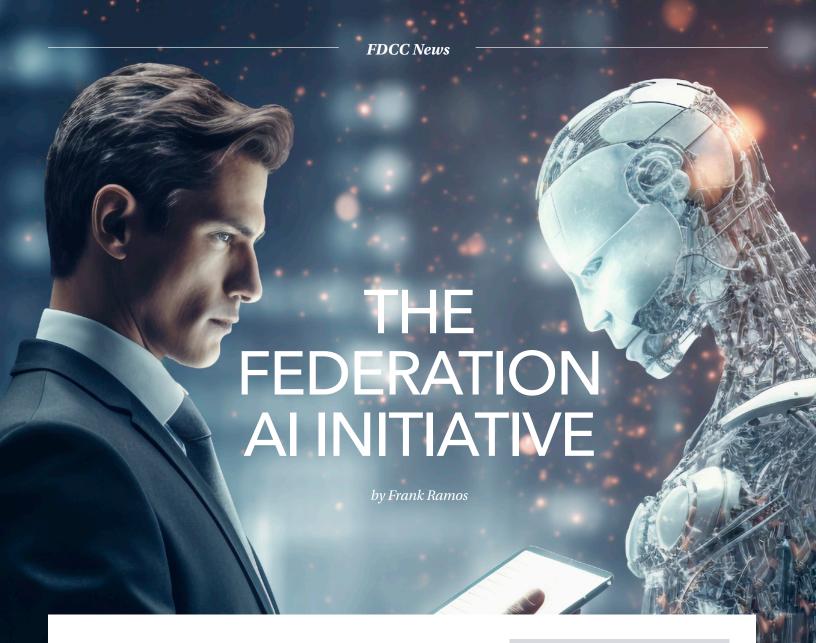
Even as an introvert, I know that the oldest and most reliable way to support your well-being and succeed in business is to not do everything on your own. Collaborating with your colleagues, friends from professional associations, or even your clients can be a great way to market and network at the same time. In addition, it may help you keep ideas fresh, build courage to try new things, and avoid putting too much pressure on yourself.



I know lawyers face many pressures and business development is one of them. If you do it right, though, business development can be fun and support wellbeing. You do not have to sacrifice all your free time or mental health to be effective with business development. Instead, I hope these tips help you consider an approach to business development that helps you grow as a lawyer and a person.

Claire E. Parsons is a litigation attorney at Bricker Graydon LLP in the Cincinnati area and a member of the FDCC's FedLife Committee. Contact her at: cparsons@brickergraydon.com.







Frank Ramos

Where 2023 was the year we lawyers heard about AI, 2024 will be the year we learn and apply AI. The Federation

has created the AI Initiative, which will study how AI is transforming the practice and will share what it learns with our members. This AI education includes:

- A two-hour webinar that demonstrated how to use AI ethically, safely, and effectively.
- our Winter meeting, including a debate about AI, how law firms are adopting AI, and a legal futurist who shared her views about the future of the practice and how AI will shape it.
- An expansion of Tech-U that now includes an AI component.
- A half-day seminar on AI at our Summer Meeting in Toronto.

In addition to these, the AI Initiative will include roundtables, white papers, alerts, additional webinars, and other resources to keep us members at the cutting edge of AI for their practices. If you want to learn more, please get in touch with Frank Ramos at framos@cspalaw.com.

FDCC COMMUNICATIONS COMMITTEE ENJOYS PRODUCTIVE YEAR

by Valerie Kellner and Alan Rutkin



Valerie Kellner



Alan Rutkin

The FDCC Communications Committee has had a very productive year - and we are privileged to serve as its co-chairs. The Communications Committee's goal is to engage and communicate directly with FDCC members through various platforms, including FedSpeaks podcasts, webinars, the

Corporate Counsel Roundtables, and the FDCC 365 app. The Communications Committee has been working hard in developing, recording, and producing content that addresses a wide array of topics from emerging legal issues to worklife balance issues to learning about our newest members.

FedSpeaks podcasts continue to be one of the most popular means to communicate, engage and provide meaningful content to our members. Since the inception of the FedSpeaks podcasts in February 2022, there have been over 10,000 downloads. Nearly 200 episodes have been recorded and released to date. While most downloads are from the US, we also have listeners in Belgium, Canada, Mexico, UK, France, India, Austria, Italy and Singapore.

The ever-popular podcasts, Welcome New FDCC Members with hosts Sean Griffin and Alan Rutkin, How FDCC Members Get It Done with host Valerie Kellner, Mondays with Mills with host Mills Gallivan



and *Sponsor Podcasts* with Marisa Trasatti are still going strong.

The Communications Committee is excited to be introducing several new podcast series: FedLeads with Shelly Masters will include interviews with FDCC members about what defines and makes someone a leader. LOL: Life Outside the Law hosted by Darleene Peters, Charlene McLaughlin and Dave Smith addresses work/life balance and overcoming personal challenges. Rising Up in he FDCC is a 3-part series with former FDCC Presidents Elizabeth Lorell and Michael Glascott discussing how best to ascend in the FDCC to leadership positions. Get Out from Behind Your Desk with Jennifer Hoffman includes interviews with FDCC members about the benefits of getting involved in the FDCC.

Also, building on the success of "Coverage 101" webinar with Dan Kohane and John Trimble, the Communication Committee had a series of podcasts regarding components of the "Coverage 101" syllabus which included topics such as conditions, duty to defend, exclusions and trigger events with hosts Crystal Uebelher, Nicole Weir,

Clay Crawford, Meghan Ruesch, Michael Young and Nicole Wilinski.

The Communications Committee upcoming podcasts will also include topics such as Artificial Intelligence and recent amendments to Rule 702.

The monthly Corporate Counsel Roundtable which addresses issues solely focused on in-house counsel continues to be well attended. The topics so far have included outside counsel billing, attorney-client privilege and climate change liabilities for D&O.

If you have not listened to a podcast, we encourage you to do so. There is something for everyone. FedSpeaks podcasts are available for download on the FDCC app, the FDCC website, as well as Spotify, iTunes, Stitcher, and wherever you get your podcast. The Communications Committee is always looking for topics and suggestions or if you are interested in hosting a podcast, please reach out to either Valerie Kellner: valerie.kellner@wilsonelser.com or Alan Rutkin: Alan.Rutkin@rivkin.com.



FEDERATION OF DEFENSE & CORPORATE COUNSEL

FOUNDATION

by Stacy A. Broman



Stacy A. Broman

The FDCC Foundation had an energetic meeting at the Winter Meeting in St. Petersburg and has several updates to share.

First, the Diversity Scholarship evaluation process is well underway. William Toles and new member Jeanne Loftis have agreed to co-chair the Scholarship award for 2024. A committee of volunteer application reviewers has been established to review each of the applications as they are submitted. The Foundation is anxious to award a \$10,000 diversity scholarship to a deserving law student in memory of Barb Currie.

The Foundation has two upcoming fundraisers that will support the Foundation's many projects. First, our colleague and International Defense Counsel Member Christopher Rodd spent over 400 hours of his time building a replica of the "America" which on August 22, 1851, won the Royal Yacht Squadron's 53 mile regatta around the Isle of Wight by 18 minutes. It was quite a feat for a ship of its size to be designed and built and then to compete successfully against other ships from around the world. Chris build the yacht from a kit, hand-cut each of the individual wooden pieces for the decking, hand-sewed the sails and the trim, stained and varnished the hull, and put the model together to be sold to benefit the FDCC Foundation.

The FDCC Foundation plans to auction "America" to the highest bidder. Plans for the auction will appear in upcoming editions of the Friday 5's. The FDCC Foundation is grateful to Chris Rodd for donating this masterpiece to the Foundation and to provide the opportunity of owning this beautiful work of art to the membership.

Second, Canadian International Defense Counsel Members David and Lisa Zuber have graciously agreed to open their home for an evening celebrating friends at a Foundation fundraiser on Wednesday, July 31, 2024 - the dine around evening at the Annual Meeting in Toronto. They promise lots of food, drinks, laughs, and networking, all while raising money for the Foundation. Tickets are \$200 per person. A former Federation President is sponsoring bus transportation to and from the hotel. Tickets are limited. Please email me at sbroman@meagher. com to secure your seat. Payment can be mailed to me payable to the FDCC Foundation. Thank you to the Zubers. We look forward to a fun night at their home in Toronto.

Stacy Broman is the President of the FDCC Foundation and the managing partner of Meagher Gear's Minneapolis, MN office. Stacy can be reached at sbroman@meagher.com



International
Defense Counsel
Member
Christopher Rodd
spent over 400
hours of his time
building a replica of
the "America" which
the Foundation
will auction to the
highest bidder.



Professional Women's Forum

Building Relationships and Enhancing Our Goals

by Alycen A. Moss



Alycen A. Mo:

The Professional Women's Forum ("PWF") continues to offer women lawyers a platform to build relationships and enhance their

professional goals. It has expanded its membership over the past year and offered in-person opportunities to meet at both the Winter and Annual Meetings.

At the 2023 Winter Meeting, the PWF hosted a dinner on the rooftop at The Joseph Hotel, which was fantastic, with about 40 women attending. At the 2023 Annual Meeting, the PWF hosted a High Tea (which was a first for the FDCC), where Becky Morrison spoke about women managing stress and provided tools to balance family and work. At the 2024 Winter Meeting in St. Petersburg, the PWF hosted a dinner on the rooftop at The Birchwood Canopy. (We love a good rooftop party!). Over 60 women attended, and it was a great social and networking event. The PWF is working to plan an event for the 2024 Annual Meeting in Toronto in July, so be on the lookout for this information. Through these meetings, we have been able to expand the professional opportunities and growth of women in the PWF and in the Federation.

The PWF is currently working on several initiatives that will help build a sense of community and support for our members including: If you are not a member of the PWF, please join us by clicking on the Committees Tab and the "Join Section Now" tab on the Professional Women's Forum page of the FDCC website.



- Webinar titled "Hysterical:
 Identifying & Eliminating
 Linguistic Gender Biases in the
 Practice of Law" with Marian
 Braccia, Director of the LLM in
 Trial Advocacy Program and
 a Practice Professor of Law
 at Temple University Beasley
 School of Law;
- Webinar with an attorney coach to discuss imposter syndrome;
- Webinar on business development techniques;
- Mentorship program where younger women are paired with older women to have either one-on-one or small group meetings, and the older women can give advice and discuss skills and strategies for navigating as a female in the legal world; and

 Podcasts that highlight women members and others in the industry on how they have achieved professional success and leadership roles in their careers.

If you are not a member of the PWF, please join us by clicking on the Committees Tab and the "Join Section Now" tab on the Professional Women's Forum page of the FDCC website. You will then be on the listserv to receive communications about upcoming events. Contact me at amoss@cozen.com with any questions or ideas that you might have for the PWF.

Alycen Moss is a partner of Cozen O'Conner in Atlanta, Georgia, Chair of the professional Women's Forum, and a member of the FDCC Board of Directors. Alycen may be reached at amoss@cozen.com

FDCC Local & Regional Meetings Networking Throughout the Year

by Daniel McGrath



Daniel McGrath

Fed MEETS Local and Regional Meetings will be taking place this year in many cities across the United States. FDCC members are

planning these networking events across the country to help keep our members engaged between our larger gatherings such as the Winter Meeting and Annual Meeting. These informal social gatherings are being organized so that FDCC members new and old can meet one another in person, reconnect as we continue to exit the pandemic and return to practicing in the office, and enjoy each other's company and special FDCC fellowship. The theme of these social gatherings is "The First Round is on the FDCC!" Chairpersons in participating cities are choosing the dates and locations for these events, which will feature hors d'oeuvres, refreshments, and camaraderie.

These gatherings provide FDCC members a fun and convenient opportunity to see one another in person in light of the continuing remote work environment, Zoom court hearings and depositions, and practicing law by electronic means. Some members have been unable for a variety of reasons to attend events such as the Corporate Counsel Symposium, Insurance Industry Institute, or Winter Meeting so local gatherings provide an essential FDCC connection. Gatherings took place this fall and winter in San Francisco and Portland. Meetings are presently being planned for Houston, St. Louis, Chicago, New York, Miami, Charleston, Phoenix, Dallas, New Orleans, Seattle, Philadelphia, Boston, Atlanta, Denver, and Cleveland. Members attending these meetings are encouraged to bring along colleagues and friends who they believe could qualify as potential FDCC members. It is

hoped that these individuals by meeting with FDCC members and experiencing what it means to be part of the Federation will seek to join our organization. One of our Federation mantras is to continue to seek candidates for membership who meet or better yet exceed the FDCC's "over and above' criteria.

Please watch the weekly "Friday Five's" newsletter for further details and RSVP's for events in your area. Come and join in the fun. The FDCC is all about building networks and friendships. Please reach out to Dan McGrath or your FDCC state representative if you are interested in planning and hosting such an event in your city.

Daniel McGrath is a partner in Hinshaw & Culbertson LLP's Chicago, Illinois office and a member of the FDCC's Board of Directors. Dan can be contacted at dmcgrath@hinshawlaw.com.







Fed MEETS Atlanta

The National Foundation for Judicial Excellence CELEBRATING 20 YEARS!

by Amy L. Miletich - NFJE Board Chair



Amy L. Miletich

Our system of justice is distinguished from many others around the globe due to its respect for the sacred idea of judicial independence.

Under our system, minorities are protected from the will of the majority, and the individual from the government. A functioning democracy relies heavily on judicial independence, interwoven into our Constitutional structure. Recently, we have all witnessed how both the legislative and executive branches struggle to avoid a one-sided perspective, slowing, if not stopping progress that we so desperately need. Our Courts, however, have demonstrated a resilience in these polarized times, with judges continuing to decide cases without fear of retribution.

Twenty years ago, the National Foundation for Judicial Excellence (NFJE) was created by leading defense lawyers and incorporated as a 501(c)(3) organization. Its stated mission is to:

Address important legal policy issues affecting the law and civil justice system by providing meaningful support and education to the judiciary, by publishing scholarly works and by engaging in other efforts to continually enhance and ensure judicial excellence and fairness for all engaged in the judicial process.

This year's Symposium, which will be held in Washington D.C. in July, is entering the final stages of planning. Topics under consideration include:

- Keynote: Daniel Kiel, author of The Transition: Interpreting Justice from Thurgood Marshall to Clarence Thomas;
- Cloudy with a Chance of Litigation:Weathering Climate-Related Legal Issues;
- Behind the Curtain: Judicial Analysis of Third-Party Litigation Funding;
- From Ethics to Opinions: Artificial Intelligence in the Courts;
- The Elevator Effect: Interpersonal Relationships and Collegiality in the American Judiciary (the speakers will discuss their original data collection about the relationship between the interpersonal relationships of the judges and the law they produce);
- Interpreting Challenges to Corporate Diversity and Inclusion Efforts.

Much of the NFJE's work is done through its Annual Judicial Symposium. State appellate judges and justices from across the United States are invited as guests of the NFJE to attend the Symposium. The Symposium provides a distinguished forum where State appellate judges can discuss topics of current interest and share the camaraderie of their peers.

Last year's Symposium was entitled Pressures of the Times: Key Issues Facing State Courts. Many of the subjects covered were ones that had been requested by the judges and justices. The topics addressed key issues such as state constitutionalism, judicial security, and effective opinion writing. The U.S. Supreme Court's upcoming term and the anticipated issues to be faced by the state appellate judges was also discussed. The 2023 Symposium also featured a discussion on the implication of the amendments to Rule 702 and the role of the court as a gatekeeper for the admissibility of expert opinions. The changes to the Restatement (Third) of Torts and the potential impact on the concepts of duty and causation were also addressed.

The need and demand for judicial education and support is greater than ever. NFJE can only do its work through the donations of others. A heartfelt thank you to each and every one of you who has supported the organization through donations. Please continue to support the NFJE through your contributions and those from your firms and companies, and please encourage the appellate judges in your state to attend the 2024 NFJE Annual Judicial Symposium.

Amy L. Miletich an FDCC Defense Counsel member, the Chair of the Board of the NFJE and the founding partner of Miletich PC in Denver Colorado. She can be reached at mmiletich@miletichpc.com.

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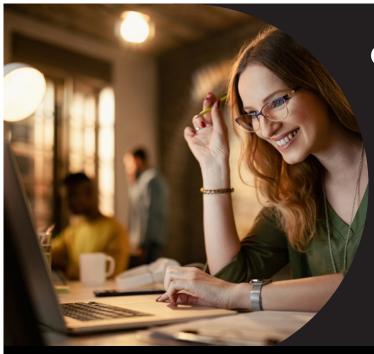
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GIVE THINGS ME TO KNOW

FDCC Friday 5's: Be the First to Know

- Meeting registrations
- Announcements
- FDCC Amicus Briefs and Comments
- Substantive Law Section articles
- Links to the FedSpeaks podcasts
- Qualitative articles from our Sponsors
- Meet our new members

See what events are coming up; and who's getting a "shout-out" this week...you can find it all the weekly Friday 5's.

Watch your inbox at 10:00am ET every Friday!

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