



The 4th Annual LF Dealmakers Forum
Advancing Litigation Finance
September 29-30, 2021 • NYC & Virtual

ABOUT THE EVENT

The 4th Annual LF Dealmakers will be held on September 29-30, 2021 at Apella in NYC & virtually. Widely considered the industry’s “go-to” event, LF Dealmakers will once again gather the top decision-makers and thought leaders in litigation finance, as well as in-house and outside counsel, and other key stakeholders – for discussion, debate, and dealmaking.

Event hallmarks include high-quality content, A-list speakers, 1-to-1 meetings, and a curated audience of senior executives, including corporate attorneys and executives, law firm partners, litigation funders, investors, insurers, and strategic advisors.

Thank you to our generous sponsors for their support: Validity Finance, Fabricant, Longford Capital, Akin Gump, Burford Capital, Curiam Capital, MoloLamken, Parker Poe, Robins Kaplan, Schulte Roth & Zabel, Therium, Westfleet Advisors, Aventurine, Avenue 33, D. E. Shaw & Co., Litigation Funding Advisers, McKool Smith, Parabellum Capital, Pretium Partners, and Statera Capital.

For more details regarding the event, registration, and our health & safety protocol, visit:
LFDealmakersForum.com.

PRELIMINARY AGENDA

(Times Listed in ET | Topics and Speakers Subject to Change)

DAY ONE: WEDNESDAY, SEPTEMBER 29TH

7:30 AM – 8:45 AM

Registration & Breakfast

8:45 AM – 9:00 AM

CHAIRPERSON’S OPENING REMARKS

9:00 AM – 9:30 AM

KEYNOTE SPEAKER

Hon. Shira A. Scheindlin, U.S. District Court for the Southern District of New York (ret.)

9:30 AM – 5:00 PM

ONE-TO-ONE MEETINGS

Attendees can schedule 30-minute meetings via our online platform

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9:30 AM – 10:30 AM

STATE OF THE LITIGATION FINANCE INDUSTRY: INNOVATIONS & OUTLOOK

- Top trends in litigation & litigation funding
- Notable financings, deals & news
- New entrants & product innovations
- Are we headed towards institutionalization?

Speakers:

Brandon Baer, Founder & CIO, **Contingency Capital**

Fred Fabricant, Managing Partner, **Fabricant**

Michael Nicolas, Co-Founder & Managing Director, **Longford Capital**

Andrew Woltman, Principal & Co-Founder, **Statera Capital**

Moderator TBD

10:30 AM – 11:00 AM

Networking Break

11:00 AM – 12:00 PM

LEGAL AND REGULATORY DEVELOPMENTS IN THE U.S. AND THE ROAD AHEAD

- Changes to law firm ownership rules in AZ, CA, UT, FL & other states
- Exploring various law firm ownership models & related ethics and other issues
- Developments in disclosure & discoverability; new funding rule in NJ
- Will funding regulations in Australia impact the U.S.?

Speakers:

Boris Ziser, Partner, **Schulte Roth & Zabel** (moderator)

Don Bivens, Partner, **Snell & Wilmer** & Chair, **ABA Center for Innovation**

Owen Cyrulnik, Managing Principal, **Curiam Capital**

Jan Jacobowitz, Founder, **Legal Ethics Advisor** & Past President of **APRL**

William Marra, Investment Manager, **Validity Finance**

12:00 PM – 2:00 PM

Networking Luncheon

2:00 PM – 2:30 PM

HOT TOPIC TBD

The 4th Annual LF Dealmakers Forum
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2:30 PM – 3:30 PM

CIO ROUNDTABLE: FOCUS ON INVESTMENT STRATEGY & RISK MANAGEMENT

- What are you investing in & how has that changed?
- How are you managing risk in your portfolio?
- Views on co-investing, securitizations & the secondary market
- Biggest lessons learned, challenges & opportunities

Speakers:

Steven Molo, Founding Partner, **MoloLamken** (moderator)
Patrick Dempsey, Chief Investment Officer, US, **Therium Capital**
Sarah Johnson, Co-Head Litigation Finance, **The D. E. Shaw Group**
Aaron Katz, Chief Investment Officer, **Parabellum Capital**
David Kerstein, Chief Risk Officer & Senior Investment Manager, **Validity Finance**

3:30 PM – 4:00 PM

Networking Break

4:00 PM – 5:00 PM

ASK THE EXPERTS USERS' EDITION: TOUGH LOVE IN LITIGATION FINANCE

This year's Ask the Experts panel will feature a twist on our usual open and candid format, where veteran users of litigation finance will share their experiences (both good and bad), as well as insights they've gained over time. They'll also impart some "tough love" in the form of advice to funders on how they could make improvements to better serve their clientele.

Speakers:

Barry Kamar, Managing Director, **Westfleet Advisors** (moderator)
Derek Ho, Partner, **Kellogg Hansen Todd Figel & Frederick**
Lewis LeClair, General Counsel, **McKool Smith**
Erika Levin, Partner, **Fox Rothschild**
Charles D. Schmerler, Head of Litigation Finance, **Pretium Partners**

5:00 PM – 6:00 PM

Networking Reception

DAY TWO: THURSDAY, SEPTEMBER 30TH

8:00 AM – 8:45 AM

Registration & Breakfast

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8:45 AM – 9:00 AM

CHAIRPERSON'S WELCOME & RECAP

9:00 AM – 2:00 PM

ONE-TO-ONE MEETINGS

Attendees can schedule 30-minute meetings via our online platform

9:00 AM – 9:45 AM

CORPORATE LITIGATION FINANCE AT A TIPPING POINT: TRENDS & CHALLENGES

- Trends in corporate affirmative recovery programs
- Growth in claim monetization / Interchange case example
- Does defense side funding make sense?
- Key challenges to corporate adoption

Speakers:

Rebecca Berrebi, Founder & CEO, **Avenue 33** (moderator)

Cono Carrano, Partner, **Akin Gump Strauss Hauer & Feld**

Vincent Montalto, Senior Litigation Counsel, **BASF**

Additional Speaker TBD

9:45 AM – 10:45 AM

MAKING SENSE OF CENTS: INTERPLAY BETWEEN FUND TYPES, DEAL STRUCTURES & COST OF CAPITAL

- Understanding Different Funds & How They're Structured
- Where the Capital is Coming From & Why It Matters
- Are Certain Funds/Capital Structures Better Suited for Certain Deals?
- What's the True Cost of Capital & Who are the Real Decision Makers?

Speakers:

Ted Farrell, Founder, **Litigation Funding Advisors** (moderator)

Tets Ishikawa, Managing Director, **LionFish**

Sarah Lieber, Managing Director & Co-Head Litigation Finance Group, **Stifel**

10:45 AM – 11:15 AM

Networking Break

11:15 AM – 12:00 PM

THE EXPANDING TOOLBOX: CHANGES IN LAW FIRM CONTINGENCY & AFA MODELS

- Key drivers & metrics in AFA usage at firms and corporations
- Law firm pricing approaches in challenging times

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- Best practices in alternative fee arrangements
- Impact & integration of litigation funding

Speakers:

David Prange, Partner, **Robins Kaplan**

Additional Speakers TBD

12:00 PM – 1:00 PM

BEYOND FINANCIAL METRICS: LITIGATION FINANCE AS A TOOL FOR GENERATING MEASURABLE SOCIAL AND ENVIRONMENTAL IMPACT

- How to supplement financial return with measurable social impact in litigation finance transactions
- For plaintiffs and counsel: How to generate funder interest in your ESG, SRI case
- A different perspective: Unique challenges and benefits for litigation funders, counsel and plaintiffs in structuring litigation finance transactions for social impact

Speakers:

Michael Kelley, Partner, **Parker Poe** (moderator)

Richard Fields, Founding Partner, **Fields PLLC**

Robert Ryan, Founder & CEO, **Aristata Capital**

Jason McCue, **Greenlit SA**

Speaker TBD, **Justice Catalyst**

1:00 PM – 2:00 PM

Networking Luncheon

2:00 PM

Event Concludes