



The 7th Annual LF Dealmakers Forum
Advancing Litigation Finance
September 17-19, 2024•Apella in NYC

ABOUT THE EVENT

The 7th Annual LF Dealmakers will be held on September 17-19, 2024 at the Apella in NYC. Widely considered the industry’s “go-to” event, LF Dealmakers returns for its seventh year as the premier gathering for thought leaders in litigation finance and top decision-makers across the legal landscape.

Event hallmarks include peer-researched content, A-list speakers, 1-to-1 meetings, and a carefully curated audience of senior executives, including leading litigation funders, litigators, law firm executives, in-house counsel, corporate executives, investors, insurers, advisors, and other key stakeholders.

Thank you to our generous sponsors for their support: Ignite Specialty Risk, Fabricant LLP, Longford Capital, Advoc8se, Bochner PLLC, C Cubed Capital Partners, CAC Specialty, Consumer Attorney Marketing Group, Contingency Capital, Crowell & Moring, Curiam Capital, Darrow, Litigation Funding Advisers, McKool Smith, Moelis & Company, MoloLamken, Pine Valley Capital Partners, Pretium Partners, Schulte Roth & Zabel, Spencer Fane, Torticity, Westfleet Advisors, D. E. Shaw & Co, Dominion, Lumenci, Saul Ewing, Gerchen Capital Partners, and Trimaxian.

For more details regarding the event visit: LFDealmakersForum.com.

AGENDA

(Times Listed in ET | Subject to Change)

DAY ONE: TUESDAY, SEPTEMBER 17TH

LF DEALMAKERS | MASS TORTS EDITION

Introducing the inaugural LF Dealmakers | Mass Torts Edition, a one-day conference designed to bridge the worlds of litigation finance and mass torts, providing a unique platform for litigation funders, plaintiffs' firms, strategic advisors, and select vendors to explore the latest trends, challenges, and opportunities. To view event details and to register, visit: MassTortsDealmakers.com.

6:00 PM – 8:00 PM

OPENING RECEPTION

The opening reception will take place offsite at the Royalton Park Avenue. Access is exclusively available to registered attendees of the 7th Annual LF Dealmakers Forum and the inaugural LF Dealmakers | Mass Torts Edition.



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DAY TWO: WEDNESDAY, SEPTEMBER 18TH

7:45 AM – 8:45 AM

Registration & Breakfast

8:45 AM – 9:00 AM

WELCOME & CHAIRPERSON'S OPENING REMARKS

Nicole Silver, Head of Operations, Lead Underwriter, **Ignite Specialty Risk**

9:00 AM – 5:00 PM

ONE-TO-ONE MEETINGS

Participants have the option to schedule 30-minute meetings utilizing our desktop or mobile app. Registered attendees will receive an invitation to login to the app the week prior to the event.

9:00 AM – 10:00 AM

THE VIEW FROM THE TOP: THE LITIGATION FINANCE INFLECTION POINT

- Assessing the performance of litigation finance as an asset class
- Key industry trends and innovations
- Developments in the secondary market
- The future of litigation finance outlook

Speakers:

- Erin Mulvaney, Legal Affairs Reporter, **The Wall Street Journal** (*moderator*)
- Brandon Baer, Founder & CIO, **Contingency Capital**
- Bill Derrough, Managing Director & Global Co-Head of Capital Structure Advisory, **Moelis & Company**
- Michael A. Nicolas, Co-Founder & Managing Director, **Longford Capital**
- Michael Richards, SVP - Distressed Debt Trading & Sourcing, **Jefferies & Company**

10:00 AM – 10:45 AM

DEEP DIVE: DIGGING INTO THE DETAILS OF DISCLOSURE

- What courts have said about disclosure: recent case highlights
- What to disclose and why: hearing it from both sides
- How to protect attorney-client and work product privilege
- What regulation is needed, if any, and why?

Speakers:



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- Alison Frankel, Litigation Columnist, **Reuters** (*moderator*)
- Erick Robinson, Partner, **Bochner PLLC**
- Peter Lambrianakos, Partner, **Fabricant**
- Ashok Pinto, Director of IP Policy, **Intel**

10:45 AM – 11:15 AM

Networking Break

11:15 AM – 12:15 PM

AFFIRMATIVE LITIGATION STRATEGIES: CREATING ECONOMIC OPPORTUNITY

- Creating an affirmative litigation program
- Structuring litigation for early recoveries
- How to avoid jeopardizing customer relationships
- Effectively using litigation funding

Speakers:

- Michael P. Fritz, Principal, **McKool Smith** (*moderator*)
- Carrie B. Freed, Investment Manager & Legal Counsel, **Omni Bridgeway**
- Paul Haskel, Partner, **Crowell & Moring**
- Vincent Montalto, Partner & Co-Chair, Affirmative Litigation Group, **DLA Piper**
- Charles Schmerler, Senior Managing Director & Head of Litigation Finance, **Pretium Partners**

12:15 PM – 1:45 PM

Networking Luncheon

1:45 PM – 2:15 PM

DEEP DIVE: THE ULTIMATE DECISION POINT - TAKING A CASE TO TRIAL

- Understanding how cases are successfully tried today
- Top practical considerations in moving forward
- What your lawyer should and shouldn't be doing
- Hedging the known unknowns

Speaker:

Steven Molo, Founding Partner, **MoloLamken**

2:15 PM – 3:00 PM



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DEALMAKERS' MASTERS: STRUCTURING WIN-WIN DEALS

- LFAs and the waterfall - making it work in your favor
- The growing use of independent counsel
- Fund structures, deal structures, terms, and returns
- New and best practices for making a deal work

Speakers:

- Michael P. Kelley, Partner, **Parker Poe** (*moderator*)
- Joseph Dunn, Managing Director, **Fortress Investment Group**
- Adam Hudes, Partner, **Vinson & Elkins**
- Sarah Johnson, Head of Litigation Investing, **D.E. Shaw & Co.**
- Ryan Stephen, Co-Founder & Managing Partner, **Pine Valley Capital Partners**

3:00 PM – 3:30 PM

Networking Break

3:30 PM – 4:15 PM

INNOVATIVE INSURANCE STRATEGIES TO MANAGE RISK

- Competition and collaboration in risk sharing
- Broadening the adoption of funding
- Insurance-backed litigation funding for plaintiffs
- Exploring sustainability of current product offerings

Speakers:

- Nicole Silver, Head of Operations, Lead Underwriter, **Ignite Specialty Risk** (*moderator*)
- Megan Easley, SVP, Contingent Risk, **CAC Specialty**
- Ted Farrell, Founder, **Litigation Funding Advisers**
- Jon Scahill, President & CEO, **Quest Patent Research Corporation**

4:15 PM – 5:00 PM

SECTOR SPOTLIGHT: CHALLENGES AND OPPORTUNITIES IN MASS TORTS FUNDING

- Key highlights and learning from LF Dealmakers | Mass Torts Edition
- Spotting the next big and best torts to fund
- Emerging and innovative uses of ABS
- Trends and opportunities in global mass actions



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Speakers:

- Steve Nober, Founder & CEO, **Consumer Attorney Marketing Group (CAMG)** (*moderator*)
- Alfredo Chang, Co-Founder & Partner, **C Cubed Capital Partners**
- Jason Ethridge, Director, **Gerchen Capital Partners**
- Scott Hardy, President, **Trimaxian**
- Uliana Pak, VP of Growth, **Torticity**

5:00 PM – 6:00 PM

Networking Reception

DAY THREE: THURSDAY, SEPTEMBER 19TH

8:00 AM – 8:50 AM

Registration & Breakfast

8:50 AM – 9:00 AM

CHAIRPERSON'S DAY ONE RECAP

Nicole Silver, Head of Operations, Lead Underwriter, **Ignite Specialty Risk**

9:00 AM – 4:00 PM

ONE-TO-ONE MEETINGS

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9:00 AM – 9:30 AM

KEYNOTE ADDRESS – FUNDING AND INSURANCE: FRIENDS, FOES, OR FRENEMIES

- Learning from insurance history: marine insurance, bond insurance, liability insurance
- Where are we now and how did we get here?
- What history tells us about the road ahead
- Challenges and controversies

Speaker:

Tom Baker, William Maul Measey Professor of Law, **University of Pennsylvania Carey Law School**

9:30 AM – 10:15 AM

ASK THE EXPERTS: LITIGATION FUNDING WAR STORIES



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A group of industry veterans will together discuss the best and worst things that have happened in their extensive years of litigation funding. They'll breakdown the details of what happened and why plus the lessons they learned.

Speakers:

- Patrick Smith, Senior Staff Writer, **The American Lawyer** (*moderator*)
- Rebecca Berrebi, Founder & CEO, **Avenue 33**
- Fred Fabricant, Managing Partner, **Fabricant LLP**
- David Kerstein, Founder & Managing Director, **Arcadia Finance**

10:15 AM – 11:00 AM

LEVERAGING TECHNOLOGY TO OPTIMIZE THE LITIGATION LIFECYCLE AND OPPORTUNITIES

- Can technology be useful for origination?
- Where are we with financial modeling capabilities?
- Barriers to adoption and implementation
- What's better: internal development or an external provider?

Speakers:

- Isabel Yishu Yang, CEO, **ArbiLex** (*moderator*)
- Evyatar Ben Artzi, CEO, **Darrow**
- Alison Hawthorne, Principal, **Beasley Allen**
- Eva Shang, Co-Founder & CEO, **Legalist**
- Eamon Walsh, President, US Market, **Advoc8se**

11:00 AM – 11:30 AM

Networking Break

11:30 AM – 12:15 PM

BEST PRACTICES IN INSTITUTIONALIZING FUNDING WITHIN THE LAW FIRM

- Gaining buy-in and developing a strong knowledge base within the firm
- Understanding the options, deal structures, and pitfalls that accompany funding
- Developing a process for presenting funding opportunities
- Knowing the market

Speakers:

- Jim Batson, Chief Operating Officer, **Westfleet Advisors** (*moderator*)



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- Lauren Coppola, Partner, **Robins Kaplan**
- Randy J. Curato, VP, Senior Loss Prevention Counsel, **ALAS**
- John S. Holley, Partner, **Spencer Fane**

12:15 PM – 12:45 PM

THE POLICY BRIEFING: NAVIGATING THE REGULATORY LANDSCAPE

- Key updates from the Federal and State level
- The latest from the Courts
- The push for regulation
- How the industry is responding

Speakers:

- Courtney Quish, Managing Director, **Fortress Investment Group**
- Victoria Sahani, Professor of Law, **Boston University**
- Boris Ziser, Partner, **Schulte Roth + Zabel**

12:45 PM – 2:00 PM

Networking Luncheon

2:00 PM – 4:00 PM

ONE-TO-ONE MEETINGS CONTINUE

2:00 PM – 3:00 PM

THE LF DEALMAKERS' POLICY WORKING GROUP

As a part of the LF Dealmakers Think & Drink, attendees will have the option to join an intimate discussion looking at how the industry is responding to increased scrutiny and opposition. Groups will work to strategize and craft effective responses to growing calls for regulatory and political change.

3:00 PM – 4:00 PM

DEALMAKERS' THINK & DRINK CONTINUES

Participants can schedule one-to-one meetings or join us for networking and roundtable discussions accompanied by wine, soft drinks and nibbles. Roundtable topics to be announced.

4:00 PM

Event Concludes