

RISK MANAGEMENT PARTNERS, INC.
INSURANCE AND RISK MANAGEMENT EXPERT WITNESS SERVICES



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SCOTT STEIN, A.R.M.

Areas of Expertise: Agent and Broker Procedures, Insurance Agent and Broker Liability, Insurance Errors and Omissions, Professional Liability Insurance, Directors and Officers Insurance, Insurance Coverage, Property & Casualty Insurance, Agency Standards of Care, Errors and Omissions Insurance, Insurance Disputes-Sales Practices and Bad Faith, Risk Management Practices and Procedures, Insurance Contract Review, Insurance Proposals, Umbrella Liability, Insurance Compliance, Intermediary and Broker Procedures, Risk Management Analysis for Insured's.

Professional Experience: Insurance and Risk Management:

President

Risk Management Partners, Inc. / Intellectual Property Risk Resources, Inc.

February 2000 to Present

Delray Beach, FL / Weston, FL

For Risk Management Partners, Inc.: Founded retail insurance broker for property/casualty covers. Placement in all aspects of property insurance and professional liability covers inclusive of: property insurance, general liability insurance, medical malpractice, professional legal liability, directors and officers cover, architects and engineers, real estate, and miscellaneous errors and omissions insurance. Additional placement of workers compensation and umbrella and excess policies. Agency membership in the Florida Association of Insurance Agents, and membership within the Independent Insurance Agencies as a Trusted Choice Agency. Extensive placement of covers with Wholesale Insurance Brokers, and through direct agency contract placements. Member: Professional Liability Underwriting Society (PLUS) 1994-Present .

For Intellectual Property Risk Resources, Inc.:

February 2000-May 2004

Founded organization dedicated to comprehensively addressing risk management for intellectual property. Integrated critical resources, including IP valuation and assessment tools and relationships culminating in development of proprietary intellectual property underwriting models enabling predictability of risk. Originated exclusive intellectual property insurance programs for risks domiciled in the United States. Separate exclusive program created for Israeli domiciled exposures. Forged corporate partnership with leading US program administrator enabling IPRR to distribute, market, and sell intellectual property insurance products on a co-branded basis. Developed consulting relationships with insurance carriers and brokers requesting our resources and guidance. Integrated IPRR's services within IP and multi-practice law firms to cross-promote. Drafted studies on IP exposures for determination of monetization potential and applicability of utilization of corporate IP assets for financing options. Frequent speaker to various organizations on IP risk management and overviews of the market in media interviews.

Managing Director

Intellectual Property Risk Management, a division of Summit Global Partners, Inc.

February 1998 to February 2000

Boca Raton, FL

Coordinated national sales and marketing of proprietary patent infringement insurance program underwritten by syndicates at Lloyds of London. Responsibilities included direct client sales, development of national sales team, product distribution, and marketing and public relations activities. Marketing responsibilities included coordination of advertising, public relations, brochures, and sales literature. Distribution responsibilities included creation of marketing alliances with wholesale and retail insurance brokerage operations throughout the United States, as well as the development of partnership arrangements with key trade organizations from which we were able to leverage sales opportunities and exclusivity agreements. Frequent speeches and media interviews as spokesperson for IPRM. Program budget and financial projection responsibilities.

Account Executive

Arthur J. Gallagher and Company, Inc.

March 1993 to February 1998

Miami, FL

Producer in commercial accounts division of multinational risk management brokerage organization responsible for sales, marketing, and retention of client insurance programs. Specialization in professional liability insurance to include directors and officers and errors and omissions coverage for publicly traded companies. Expertise in banking, real estate, and professional legal liability insurance covers. Multiple top production awards.

Educational Profile

B.B.A., Finance
George Washington University
School of Government & Business Administration

May 1984
Washington, DC

Associate in Risk Management (ARM)
Insurance Institute of America

May 1997
Malvern, PA

SCOTT STEIN, A.R.M.

Cases In Which I have Testified or Been Deposed in the Past Four Years:

1. Circuit court of the 11th Judicial Circuit in and for Miami-Dade County, Florida. Case No. 03-4222 CA 33, National Union Fire Insurance Company of Pittsburgh, Plaintiff vs. Seitlin & Company, Defendant/Third Party Plaintiff vs. Repath McCauley Woods, LLC, Third-party Defendant. I was the expert for Repath McCauley Woods, LLC and was both deposed and testified at trial.
2. Manpower of Southern Nevada, Inc., Claimant v. Crawford & Company, AAA 30-181-00309-06. In this AAA case, I was the expert for Manpower of Southern Nevada, Inc. I testified at Arbitration.
3. Circuit Court of the Ninth Judicial Circuit, Orange County, Florida, Case No. CI 95-2535, Div. 40, Ohio Casualty Insurance Company, Plaintiff v. Florida Municipal Power Agency, Defendant, Ohio Casualty Insurance Company, Plaintiff v. Tucker & Branham, Inc. Defendant. I was deposed and testified at trial. I was retained as the expert for Ohio Casualty Insurance Group.
4. Integrated Health Plan, Inc. Plaintiff vs. Comegy Insurance Agency, Defendant. I was retained by the Plaintiff, and I was deposed.
5. Circuit Court of the 15th Judicial Circuit in and for Palm Beach County, Florida, Case No. 50 2006CA013968, Shore Delray Beach, LLC, Plaintiff vs. Restaurant Programs of America, LLC, Defendant, Restaurant Programs of America, LLC, Defendant/Third Party Plaintiff vs. Brady Risk Restaurant Group, Inc., Third-party Defendants. I was the expert for Restaurant Programs of America and was deposed in this case.
6. Circuit Court of the Twentieth Judicial Circuit In and For Hendry County, Florida, Case No. 07-152-CA, Jeanne J Squitier, Plaintiff vs. John C. Perry, Jr., d/b/a The John C. Perry Insurance Agency, Defendant. I was engaged as the expert for the Plaintiff in this case and I was deposed.
7. Circuit Court in and for Escambia County, Florida, Case No. 2005-CA-1027, Lillo's Italian Restaurant, Inc., Plaintiff vs. Underwood Anderson & Associates, Inc., Defendant. I was engaged as an expert for the Plaintiff, and testified at trial. Attorney was Lisa S. Minchew, P.A.
8. Circuit Court of the 17th Judicial Circuit in and for Broward County, Florida, Case No. 06-17192(14), Thermoset Corporation f/k/a Thermoset Roofing Corporation, v. Frank H. Furman, Inc., Defendant. I was retained by the Plaintiff and was deposed. Attorney is Juan Martinez at Gray Robinson, Miami.
9. United States District Court, Southern District of Florida, Case No. 08-CV-80254, Tiara Condominium Association, Plaintiff vs. Marsh & McClellan Companies, Marsh, Inc., Marsh USA, Inc., Defendants. I was retained by Defendant. I was deposed and prepared an

extensive Expert Witness Report. Attorneys were Wilkie Farr & Gallagher, LLP, 033011NYC).

10. District Court, 444th Judicial District, Cameron County, Texas, Case No. 2009-05-2987-H, National Heritage Foundation, Plaintiff vs. Juan Mancillas, M.D. and Sylvia Mancillas, Individually and As Next Friends of Carlo Landa Mancillas and Omar Landa Mancillas and Philadelphia Indemnity Insurance Company, Defendants. I was retained by the Defendant and was deposed. Attorneys were Cokinos, Bosien & Young, Houston and San Antonio, Texas.
11. Circuit Court, 10th Judicial Circuit, Polk County, Florida, Case No. 08-CA-4802, Rebecca Ann Thompson, as Personal Representative of the Estate of Joshua N. Thompson, Deceased, and as the Assignee of John C. Tingler, Charles L. Tingler and Celeste Tingler, Plaintiff vs. State Farm Florida Insurance Company, a Florida corporation, Defendant. I was retained by attorneys for Plaintiff and was deposed. Attorneys were Frost Van den Boom & Smith, Bartow, Florida.
12. Circuit Court, 11th Judicial Circuit, Miami-Dade County, Florida, Case No. 08-493-68CA 08, John and Julie Phillips, Plaintiffs vs. First Protective Insurance Company, Defendant v. Robinson Insurance, Inc., Third Party Defendant. I was retained by attorneys for First Protective Insurance Company and was deposed. Attorneys are Sheeche and Associates, Inc. Case was settled.
13. District Court, Southern District of Florida, Case No. 11-61577-CIV-Altonga/Simonton, Ocean's 11 Bar & Grill, Inc., Plaintiff vs. Indemnity Insurance Corporation RRG, Defendants. I was retained by attorney Joseph Dawson for Ocean's 11 Bar & Grill, Inc. and was deposed. Trial is set for later this year.
14. District Court, Southern District of Florida, Case No. 9:11-80320-Williams/Hopkins, Sandra K. Trujillo and Sara Anne Trujillo, Plaintiffs vs. USAA Casualty Insurance Company, Defendant. I was retained as an expert by law firm of Shutts & Bowen LLP for Defendant. I was deposed. Trial is set for later this year.
15. District Court, Southern District of Florida, Case No.: 11-CV-60883 MGC, Beach Bars USA, LLC, et al. Plaintiffs vs. Indemnity Insurance Corporation of DC, Defendant. I was retained by attorney John D. Kallen, P.A. for Beach Bars, USA, LLC. I was deposed. Trial is set for later this year.
16. State of New Mexico, County of Santa Fe, First Judicial District Court, Case No: D-0101-CV-200501297, Suzanne Guest and the Guest Law Firm, P.C., Plaintiffs vs. Allstate Insurance Company, Defendant. I was retained by attorney Suzanne Guest for Plaintiffs. I was deposed. Evidentiary Hearing is set for later this year.
17. Circuit Court of the 17th Judicial Circuit in and for Broward County, Florida, Case No.: 09-037544(25), Ventnor "B" Condominium Association, Inc., Plaintiff v. The Plastridge Agency, Inc, Condominium Owners Organization of Century Village, CVEMMC Master Management Company, Inc, Defendants. I was retained by the Garrity/Weiss P.A. Law Firm on behalf of Plaintiff. I was deposed. Trial is set for later this year.

18. District Court, Middle District of Florida, Case No. 6:12-CV-914-ORL-28GJK, Trovillion Construction & Development, Inc., Plaintiff v. Mid-Continent Casualty Company, Casa Jardin Condominium Association, Inc. I was retained by counsel for Plaintiff, and I was deposed. Trial is set for later in the year.