

Sameer Somal, CFA, CAIA, CFP®
4251 Lynn Circle • Doylestown, PA 18902
Cell: (202) 276-7589 • ssomal@blueoceanglobaltech.com

Experience

Blue Ocean Global Technology <i>Co-Founder & CEO</i>	New York, NY 2012 – Present
Girl Power Talk <i>Co-Founder, Chief People Officer & Board Member</i>	Chandigarh, India 2017 – Present
Grupo YaQuedó <i>Managing Director</i>	Mexico City, Mexico 2019 – Present
Blue Ocean Global Wealth <i>Co-Founder & CFO</i>	Washington, DC 2012 –2020
The Bank of Nova Scotia <i>Investment Strategy Group</i>	Toronto, Canada 2011 –2012
Merrill Lynch & Co. Inc. <i>Financial Advisor & Technology Intermediary</i>	Princeton, NJ & New York, NY 2006 –2010
Morgan Stanley <i>Global Wealth Management</i>	Doylestown, PA 2005 –2006
Adviser Compliance Associates <i>Regulatory Compliance</i>	Washington, DC 2003 –2004

Board Service, Associations & Education

CFA Institute <i>Host of Topic @ Hand, Speaker, Board of Regents, Examinations Senior Grader & Speaker</i>	Charlottesville, VA 2009 – Present
Legal Marketing Association <i>Education Advisory Council, 2030 Task Force, Speaker</i>	Chicago, IL 2019 – Present
CFP Board <i>Council on Education, Women's Initiative (WIN) Advocate, CE Sponsor & Speaker</i>	Washington, DC 2009 – Present
CAIA Association <i>Speaker & Member</i>	Boston, MA 2011 – Present
Women Economic Forum <i>Advisory Executive Council (AEC)</i>	New Delhi, India 2016 – Present
The Future Business Leaders of America-Phi Beta Lambda <i>National Board Member</i>	Reston, VA 2022 – Present
iPlan Education Institute <i>Board of Directors</i>	New Delhi, India 2013 – Present
College Possible <i>Board of Directors</i>	Philadelphia, PA 2018 – Present
R.J. Leonard Foundation <i>Board of Directors</i>	Doylestown, PA 2015 –2019
Financial Planning Association <i>FPA Philadelphia Board of Directors, Audit & Membership Committee</i>	United States 2011–2018
Georgetown University, McDonough School of Business	Washington, DC

Awards

- CFA Institute Inspirational Leader Award – 2022
- Business Elite 40 under 40 – 2020
- Women Economic Forum: Iconic Leader – 2017
- Investment News 40 under 40 – 2014

Expert Witness Case History

- Vilma Nokaj v. North East Dental Management, LLC, formerly known as Garden State Dental Management, LLC, d/b/a Family Dental Group, Dr. Michal Gelbart, Dr. Fred Friedman, Dr. Lawrence Stein, Virginia Wicke, Carolyn Totillo, Justine Antonatos, and Maria Farides, Also referred to as Nokaj v. NEDM, et al
- Atmosphere Hospitality Management, LLC, v. ZelJkaCurtullo, Shiba Investments Inc., and Karim Merali
- Iryna Boyko v. Benny The Bum's Restaurant and Vladimir A. Mosendz
- K.G.S., individually, and as Guardian and Next Friend of Baby Doe v. Thehuffingtonpost.com, Inc., d/b/a The Huffington Post; MirahRiben; David G. Kennedy; The Kennedy Law Firm; Amber Geislinger; WALA-TV; Meredith Corp.; WBRC, LLC; Raycom Media, Inc.; and Fictitious Parties "A-Z,"
- Susan Edwards v. Aegis Wealth Group, LLC dba Everspire, and Gerilyn Merrill
- Christopher Brown v. Damon Dash; Poppington LLC d/b/a Dame Dash Studios; The Dash Group LLC; and Raquel Horn
- Monique Bunn v. Damon Anthony Dash, Dame Dash Studios d/b/a Poppington LLC, Raquel Horn and The Dash Group LLC
- John Cooksey v. Roosevelt Benford
- Adam M Ludwin, Esq., Ludwin Law Group, P.A., & Joanna Zeitlin, Plaintiffs v. Matthew B. Proman, A/K/A Matt Proman
- Lawrence A. Dordea v. Maggie Freleng, Obsessed Network, LLC., Sue L. Gless Thorne, John W. Hardin & Jason C. Baldwin
- Aris Hines & Brandi Thomason v. Terry S. Johnson, individually and in his Official capacity as Sheriff of Alamance County, Randy Jones, in his official capacity as Deputy Sheriff of Alamance County, John Doe Corporation, in its capacity as Surety on the Official Bond of the Sheriff of Alamance County, NGM Insurance Company, and Doe Deputies 1-10
- Idlibi, Ammar, A v. Hartford Courant Co.
- Rick Dobbins & Kate Preston v. Raul Harris & Desert State Mortgage, LLC
- Jay Lopez v. OFC. Collins, et. al
- Board of Directors of Wilmington Education Organization and Wilmington Education Organization d/b/a Coastal Preparatory Academy v. Shandra Gilles
- GOLO, LLC v. Goli Nutrition Inc., et al
- Nested Bean Inc. v. Dreamland Baby Co.
- Patrice Gordon v. Board of Education for the city of Chicago
- Larry Washington, Jr. v. Board of Education for the city of Chicago
- Donovan Robinson v. Board of Education for the city of Chicago
- John Johnson v. Board of Education for the city of Chicago
- Uri Ottensoser v. Meta Platforms LLC
- Providence Capital Funding Inc v Lozamira Inc, Rosa Lozano, Maria, Miramontes, Karina Miramontes, Gerardo Lozano, Fernanda Lozano and Does 1-20
- Dennis P. Block, Individually and doing business as Dennis P. Block & Associates, Hasti Rahsepar. An individual, Paul Eric Gold, an individual, Azam Riesen, an Individual, vs. John Doe, Brett Schulte, an individual, Daniel Bramzon, an Individual; BASTA Inc, a California Corporation And Does 4 Through 50
- Leslie Lilien v. Olaplex, Olaplex Holdings
- Damon Fryer v. Parker Nirenstein

The above listings do not include multiple cases on a strict NDA or those where minors are involved. Case experience: cyber bullying, hacking, cyber fraud, privacy breach, impersonation, cyber investigations, digital forensics, Google analytics, data breach, Facebook, Instagram, YouTube, Snapchat, Tiktok, digital marketing, IP infringement, trademark disputes, design patent infringement, due diligence (IP), IP damages, Lanham Act, unfair competition, trade secrets misappropriation, emotional distress damages, punitive and compensatory damages etc.

Recent Articles Authored

[Emotional Distress Damages: Ways to Deal with Defamation \(Blue Ocean Blog\)](#)
[6 Social Media Community Management Tips for Better Customer Loyalty \(Enterprise Viewpoint\)](#)
[Defamation of Character and Emotional Distress Damage Charges \(Blue Ocean Blog\)](#)
[5 Lessons To Learn From Famous Corporate Reputation Crises \(Worth\)](#)
[Have Controversial Opinions on The Current Crisis? Here's How to Manage Your Online Reputation \(Real Leaders\)](#)
[Online Reputation Management, and Why It Is Important \(Business.com\)](#)
[The role of SEO in online reputation management \(ORM\) \(Search Engine Watch\)](#)
[How to Prove Defamation and Calculate Damages? \(Blue Ocean Blog\)](#)

[Protecting Your Reputation in a Post Fact-check World \(Reputation Today\)](#)
[Investing In Online Reputation Management Is No Longer Optional \(Blue Ocean Blog\)](#)
[Case Study: Helping CEOs Protect and Rebuild Their Reputation \(Blue Ocean Blog\)](#)
[The Nuances of Digital Transformation in the Emerging Digital Era \(New Startups\)](#)
[How Businesses Can Build, Monitor, and Repair Their Online Reputation \(Bplans\)](#)
[GameStop, Artificial Intelligence, Social Media, and the Future of Investing \(CFA Institute\)](#)
[Online Brand Management During the Coronavirus Pandemic \(Startup Info\)](#)
[When to Use Big Data — and When Not To \(CFA Institute\)](#)
[Building & Protecting Your Digital Presence During the COVID-19 Pandemic \(GoodFirms\)](#)
[Your Online Reputation: 7 Things CEOs Must Know \(Blue Ocean Blog\)](#)
[Aiming For A Digital Transformation? Don't Forget Your Online Reputation \(Chief Executive\)](#)
[Why People Drive Artificial Intelligence Today and Tomorrow \(CFA Institute\)](#)
[On-Page Optimization Lets You Take Control of Your Business Success \(ReadWrite\)](#)
[Digital Transformation: 6 Tips For Success \(Blue Ocean Blog\)](#)
[Online Reputation Marketing: 7 Solid Tips for Social Media \(CoSchedule\)](#)
[Why Your Company's Online Reputation Matters \(Entrepreneur\)](#)
[Negative Press is Inevitable for Modern CEOs — And That's Not a Bad Thing \(CEO World\)](#)
[How to Manage Fake Reviews on Google, Facebook, and Glassdoor \(The Manifest\)](#)
[Digital Reputation Management 101 \(CFA Institute\)](#)
[Online Reputation Management Guide \(Social Media Examiner\)](#)
[How to Improve or Restore Your Online Reputation \(Social Media Examiner\)](#)
[Sameer Somal On The Digital Revolution Of The Internet \(Attorney at Law Magazine\)](#)
[Case Study: Why Efficient Online Reputation Repair Involves More Than Content Suppression \(Experts.com\)](#)
[Reverse SEO for Law Firms: How to Protect Yourself and Your Clients against Negative Content \(Of Counsel - The Legal Practice and Management Report\)](#)

CFA Institute Experience

- Member of the CFA Institute global [approved speaker list](#). Recent global CFA engagements include Colombia, Netherlands, Cayman Islands, Cleveland, Orange County, Calgary, Louisville, Nebraska, Americas SLC, South Florida, Naples, Edmonton, Vietnam, Mexico City, Austin, San Antonio, Dallas, Houston, Pittsburgh, Vermont, Bangladesh, Tennessee and Chicago. [Sample references](#).
- Host of the CFA Institute talk show, entitled The Topic @ Hand. ([photo shared on twitter](#) from CFAI Studios).
- Member of the Board of Regents for the CFA Institute's Seminar for Global Investors.
- [Contributing author](#) at CFA Institute's Enterprising Investor Blog.
- Senior Grader of CFA exams (8 years).
- Engaged for special projects, including: [CFA Institute: Why We Volunteer | Sameer Somal](#) & [CFA Program Success – 10 Timeless Tips For the CFA Charterholder Exams | Sameer Somal, CFA](#)

Recent Speaking Engagements Include

- | | |
|--|--|
| • IBM (Athens, Greece) | • Clear Law Institute (Arlington, VA) |
| • Federal Home & Loan Bank (Cincinnati, OH) | • Benchbar Conference (Atlantic City, NJ) |
| • Portfolio Management Association of Canada (Toronto, Canada) | • Legal Week (New York, NY) |
| • InterCon USA (Las Vegas, NV) | • Mobile Growth Summit (New York, NY) |
| • Legal Marketing Association (Orlando, FL) | • Dimensional Fund Advisors (Chicago, IL) |
| • Empowering A Billion Women (Austin, TX) | • Scotiabank (Cayman Islands) |
| • Legal Marketing Association (Philadelphia, PA) | • Philippines HR Summit (Manila, Philippines) |
| • CFA Institute VBA Netherlands (Amsterdam, Netherlands) | • U.S. Department of State (Washington, D.C.) |
| | • Project Management Institute (San Fernando Valley, CA) |

Continuing Legal Education (CLE) Programs

- CLE Presentation 1: Using Social Media Effectively and Ethically in Your Law Practice 2019
- CLE Presentation 2: Introduction to Online Reputation Management for Attorneys & Clients
- CLE Presentation 3: Advanced Online Reputation Management for Attorneys & Clients

Link to White Paper: [Internet Defamation, Reputation Management, and the Law in the Internet Age](#)

Public References Available: <https://www.linkedin.com/in/sameersomal/>