

Member Newsletter

Issue 27 | October 2016

President's Message »



These Interesting Times are killing me! And no, I'm not talking about the election. Mary and I have just moved to Nashville. This comes after 33 years in the same house in Corinth and six generations in Mississippi. A very tough decision for sure, but many of you understand the attraction of grandkids. This will put us within a mile of Jane and her family and ten minutes from an airport with direct flights to Fort Worth, where Matt and his kids live. Life is good. It's also busy (the move aside). I'm in the middle of a major case in New York that was referred to me by our old friend and former AAIMCo member, **Roger Thomas**. Thanks, AAIMCo!

Seattle! Be There! Please start making plans for our Annual Conference which will be held in Seattle, Thursday afternoon, April 27 through Saturday afternoon, April 29. We will be staying at the Mayflower Park Hotel, a wonderful property located in downtown Seattle. Our conference chairman, **Russ Taylor**, has secured a great rate for us. Information on the Conference is included in this newsletter. Our program chairman, Seattle's own **Peter Marchel**, will have an outstanding lineup of speakers. Please contact Peter if you're interested in making a presentation at the conference. I truly believe that it is impossible to appreciate the benefits of AAIMCo without attending the annual conference. It is also important to remember that our bylaws require each member to attend a conference at least once every three years. Please don't miss this opportunity to network with some of the finest insurance consultants in the country.

It's out! After almost two years of dedicated effort, **Al Diamond** and his committee have completed the 2016 edition of "Standards and Guidelines for Appraising Insurance Agencies / Brokerages". The revisions were reviewed at our Annual Conference in San Antonio and received final approval on a membership-wide conference call. Al is also working very hard to see that the treatise receives as much recognition as possible within our industry, as well as the legal community at large. Please contact Al if you think you could assist with this effort. The 2016 edition is available now on our website. Al, thanks for your committee's outstanding contribution.

Our membership Chairman, **Kevin Hromas**, continues to do an outstanding job, with membership steadily rising. If you know of anyone that you believe would make a good member of AAIMCo, please contact Kevin at khromas@aol.com.

I would like to encourage everyone to add the AAIMCo logo to your letterhead and email signature. The logo cuts can be found on our website under the Member Resources section. Also in that section, you will find access to Versus Law and Producer Online-Plus. These are both great member benefit that are included in your dues! Speaking of the website, it continues to get better and better, thanks to the hard work of our webmaster **Lee Hoffman**. Please don't forget to upload any articles you have written to the website library.

Van E. Hedges
MI, CPCU, ChFC, CLU, CIC, CRM, AAI

Association News ➤

Kathleen Bianculli - Insurance Professional of the Year

Michigan Member, **Kathleen Bianculli** was recently named Insurance Professional of the Year at the Annual Convention of the International Association of Insurance Professionals.

The Insurance Professional of the Year Award recognizes excellence among those who have been employed in the insurance industry for a minimum of ten years, involvement in the insurance industry, education programs, industry experience, current career position, activities undertaken in the community, and response to an industry-related essay question.

Kevin Quinley - A Prolific Publisher

Kevin Quinley of Virginia has been busy publishing articles with various industry resources. Including, "Should You Authorize that Summary Judgment Motion" (Claims Magazine, June 2016), and "Insurance Claims Ramifications of Virtual Reality Technology" (CPCU Insights, Fall 2016).

Kevin has also recently given a presentation titled "Not Your Father's Claim File With Stick Notes and Coffee Stains: Claim Files in the Digital Age" at the American Conference Institute Extracontractual Liability and Bad Faith Conference held in New York City earlier this year

Lisa Harrington - IRMI Discounts Offered to AAIMCo Members

Retired Member, **Lisa Harrington**, the current EVP & Chief Marketing Officer of IRMI, would like to remind all AAIMCo Members of the package of benefits IRMI is offering to our Members:

For any further information on the programs IRMI is offering our Members please contact Ms. Harrington at Lisa.H@IRMI.com.

Peter Marchel - Incident Response Program (IRP)

Cyber incidents are on the rise across all types of business and industries. The regulatory authorities in the areas of banking and health care are requiring those that do business in these areas to have an Incident Response Plan (IRP) in place to promptly address cyber incidents.

Last fall, **Peter Marchel**, Founder of Marchel & Associates Risk Consulting, and Tom Schauer, Principal at Clifton Larson Allen, collaborated with the Community Bankers of Washington to create the Community Bank Incident Response (CBIR) program. The program involves representatives with long experience in the areas of insurance, law, public relations and IT audit and security.

Members receive:

- Cybersecurity insurance review
- Coaching session to facilitate a crisis communication plan
- Consultation on technical incident detection, including an information security incident table-top test
- Legal consultation on incident response preparedness, including breach notification obligation analysis
- Incident Response Plan

For more information regarding the IRP contact Peter.

Mike Manes - A Different Perspective

Our longtime Member, **Mike Manes** has published another interesting article on the "Insurance Thought Leadership" website. The 26 Most Important Words in Business lists his thoughts on the most important words in business, and the impact they can have. He also encourages readers to formulate their own lists that will foster personal growth. The article can be found by clicking [here](#).

Have news for the next edition?

We want to know what's been going on in your practice. Received an award? In the middle of a really interesting assignment? Published an article?

Email your news to Lesley Perkins.

lesley.perkins@aimco.com

Membership Report ▶

AAIMCo continues to move forward in establishing the organization as the premier association for insurance experts, risk consultants and agency resources. To that end, we are proud to announce the acceptance of THREE new Professional Members along with THREE new Affiliate Members since our last newsletter in June. If you haven't done so to date, I encourage everyone to reach out and extend a welcome to these new members.

Our three new Professional Members are:

Neal Bordenave

RiskPro Insurance Services, Inc.
Chico, CA
www.cainsuranceexpert.com



President, CEO and Founder of RiskPro Insurance Services, Inc., Mr. Bordenave provides a wide range of consulting and legal expertise to clients across the US.

Dannette Leonhardi

Puget Sound Claim Consulting, Inc.
Seattle, WA
www.pugetsoundclaimconsulting.com

Puget Sound Claim Consulting (PSCC) operates under three trade names: Puget Sound Environmental Claim Consulting (PSECC); Puget Sound Claim Consulting (PSCC) and Puget Sound Risk & Insurance Consulting (PSRIC). Each offers distinct specialties to their clients.

Casey Roberts

Laurus Insurance Consulting
Lincoln, CA
www.laurusinsuranceconsulting.com

Laurus (taken from the Latin word for "victory" or "success") Insurance Consulting provides sales coaching, continuing education for agencies, and expert witness services to a wide range of clients through-out the US.

The Executive Board also wants to recognize our three new Affiliate Members. Their interest in being an affiliate member of AAIMCo is one more facet of the importance of the "AAIMCo Brand" in the insurance industry. The ability to have qualified, financially stable and professional resources that our members may confidently recommend to our individual clients when the need arises is just one more reason AAIMCo stands out in the insurance industry. I would encourage each member to become familiar with the services our Affiliate Members provide and take advantage of the tremendous expertise they bring to our association.

Robert Pettinnicchi

InsurBanc – a Division of Connecticut Community Bank, N.A.
Farmington, CT
www.insurbanc.com

InsurBanc's sole mission is to provide professional financial services to the insurance agents. As a bank that was founded by and for the independent insurance agencies, everything that they do, attempts to solve financial challenges in the same consultative way that independent agents solve customer challenges. InsurBanc is committed to focus on their core constituency - providing the necessary capital to keep the insurance industry thriving.

Kevin Hromas

JD, EGA, RPA, PLCS, HCRI-R/C, CPIU

Kevin Hromas & Associates

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(713) 416-8044
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Know of someone who would make a great member?

AAIMCo is always working to expand its membership with highly qualified consultants and associates.

Contact Membership Chair Kevin Hromas with your recommendation.

Membership Report ▶

Tom Baker

Catalyst Insurance Systems
Rowlett, TX
www.catalystinsurancesystems.com

Catalyst is a software company serving the insurance industry with a Talent Management System - Symphony. Symphony is a turnkey staff-driven solution used by independent, captive, niche agencies and MGAs to create performance based compensation plans for Producers as well as Support staff. Symphony is designed to transform compensation from an "expense" to an "investment" by aligning staff pay with their performance and how the agency does business.

**Kelly Drouillard & Matt Richter**

Live Oak Bank
Wilmington, NC
www.liveoakbank.com

Live Oak Bank is a leading small business lender offering financing solutions to select industries nationwide. The Insurance industry division focuses on agents, MGAs, wholesalers and program administrators. At Live Oak Bank strivwa to provide peace of mind when capital is needed to grow an agency.

The Board has also made some slight modifications to the application process to ensure that we have as much pertinent information regarding new applicants as possible. These changes are designed to enhance and streamline the process for all. The online application itself has been modified to require the insertion of certain information into the designated area before the applicant can proceed or submit the final version. This helps prevent incomplete applications from getting into the pipeline. We also are now requiring a formal CV from each applicant that will be shared with the entire membership once an application is approved so each of you will have information about the new member as well.

If you have any questions about the membership process, don't hesitate to let me know.

Kevin Hromas

JD, EGA, RPA, PLCS, HCRI-R/C, CPIU

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Treasurer's Report »

**Russell M. Taylor**

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Based on our results for the first nine months, 2016 will be a very positive year for AAIMCo. As the accompanying Profit & Loss Statement indicates, AAIMCo had net income of \$7,094 for the first three quarters, compared to a negative \$3,020 for the same period last year. So how did we get there?

Beginning with dues income, we had more Professional and Affiliate members at the beginning of this year than we did the previous year, resulting in increased dues from the starting line. In addition, thanks to the dedicated efforts of Membership Chairman **Kevin Hromas**, we have had a surge of new members (both Professional and Affiliate) in the past nine months. Add to that our first dues increase in many years, and our total dues is up by about \$3,600 compared to the same period last year.

This year we had an increase in Conference Registrations as the result of greater attendance at our annual Conference in San Antonio. In addition to having record attendance, the Conference was a success from a financial standpoint, with registration income within two hundred dollars of total expenses – almost a wash!

And thanks again to **Kevin Hromas** along with **Dennis Baker**, we have seen a 400% increase (\$1,700 v. \$425) in Referral Fees thus far in 2016. The referral fees, representing a donation of an hour's fee for a referral from a fellow member or the web-site, demonstrate one of the benefits of AAIMCo membership, as well as the professional confidence members have in each other.

On the Expense side, we have an increase in the Executive Director category due to an increase in the monthly rate for that position. The bulk of expense in the Other – Miscellaneous Expense category represents travel and registration costs to have Lesley Perkins, our Executive Director, attend this year's Conference in San Antonio. This was the first time she has attended one of our Conferences, and it was great to have her there so our members could meet her face-to-face!

Expense in our Research services category is down, since we paid for a multi-year subscription last year. And our Web Site Design Project is down since most of the heavy lifting was done last year.

So our bottom line is in the black at the nine month marker and should remain so for the rest of 2016. These results coupled with a healthy balance sheet means that AAIMCo continues to be in excellent financial shape.

Treasurer's Report »



Russell M. Taylor

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Balance Sheet

ASSETS

	September, 2016	September, 2015
Current Assets		
Checking / Savings (Woodforest)	22,251.77	14,763.18
Accounts Receivable	750.00	170.00
Total Current Assets	23,001.77	14,933.18
Other Assets		
Accum Depr - Sect 179	-600.35	-600.35
Epson Projector	600.35	600.35
Total Other Assets	0.00	0.00
TOTAL ASSETS	23,001.77	14,933.18
LIABILITIES & EQUITIES		
Equity		
Opening Balance Equity	5,265..39	5,265.39
Retained Earnings	10,642.79	12,687.66
Net Income	7,093.59	3,031.74
Total Equity	23,001.77	20,984.79
TOTAL LIABILITIES & EQUITIES	23,001.77	20,984.79

Profit & Loss Statement

INCOME

	Jan - Sept 2016	Jan - Sept 2015
Dues		
Dues - New Affiliate Member	400.00	440.00
Dues - Affiliate Member	600.00	360.00
Dues - Associate Member	0.00	180.00
Dues - Retired Member	180.00	270.00
Dues - New Associate Member	0.00	195.00
Dues - New Professional Member	750.00	420.00
Dues - Professional Member	13,125.00	9,600.00
Total Dues	15,055.00	11,465.00
Referral Fees	1,700.00	425.00
Application Fees	225.00	175.00
Conference Registrations	12,950.00	8,000.00
TOTAL INCOME	29,930.00	20,065.00

EXPENSE

	Jan - Sept 2016	Jan - Sept 2015
Administrative Services	900.00	1,000.00
Banking Expense	10.00	0.00
Conference Expense	13,143.24	10,203.73
Executive Director Services	3,450.00	2,500.00
Insurance	2,261.00	2,186.00
IT Services and Hosting Fees	827.76	516.86
Other - Misc. Expense	1,374.41	0.00
Photocopies	0.00	492.96
Postage & Delivery	0.00	77.28
Research Services	850.00	2,579.20
Website Design Project	0.00	3,500.00
TOTAL EXPENSE	22,836.41	23,084.87

NET INCOME

7,093.59

-3,019.87

Member Spotlight ›

Stanley L. Lipshultz

JD, CPCU

Stan Lipshultz is one of those rare individuals who was born in the District of Columbia. He is a lifetime resident of the District of Columbia and suburban Maryland. He lives with his wife, Melissa, an insurance agent, in North Bethesda, Maryland. He has three grown boys and two grandchildren, one about to graduate from college. He is an independent consultant providing services in insurance litigation management and consulting, serves as an expert witness in disputes involving agents and brokers errors and omissions, claims handling, bad faith and insurance coverage issues. From 2004 through 2008, Stan was a consultant for a deputy commissioner in the Maryland Insurance Administration. In addition to serving as an insurance instructor in numerous areas, Stan also serves as a mediator and arbitrator in insurance related matters.



He graduated from Washington University in St. Louis in 1967 with a Bachelor's degree in History and Political Science, and the Washington College of Law, the American University with a JD degree in 1970. His first love is teaching insurance agents and attorneys, most likely a result of his first job as a high school civics and United States History teacher. Now he spends time instructing insurance agents on the finer points of insurance, including errors and omissions and insurance ethics among other topics.

He started his career in insurance in 1968 as a claims adjuster and then liability supervisor in the Insurance Company of North America's (INA) Washington, D.C.

service office while attending law school at night. In 1970 he was employed by the Federal National Mortgage Association in the Mortgage Operations department drafting guides for the mortgage companies and banks that did business with FNMA.

After graduating from law school and passing the Maryland bar examination, he was admitted to both the Maryland and District of Columbia bars in 1971. He has the Martindale Hubbell Peer Review Rating AV Preeminent®, the highest peer rating standard which signifies that the lawyer's reviewed peers rank him at the highest level of professional excellence for legal knowledge, communication skills and ethical standards.

He served as an insurance defense counsel until 1998 with the law firm of Lipshultz and Hone, located in Silver Spring, MD, and remains "Of Counsel" to the firm. He was admitted to the United States Supreme Court in 1975, the District of Columbia Court of Appeals in 1972, the United States Court of Appeals for the District of Columbia Circuit, and the United States District Court for the District of Maryland in 1972. He is also a member of both the United States District courts for the Fourth Circuit (1976) and the Sixth Circuit (1987).



Stanley L. Lipshultz
JD, CPCU

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In 1989 he earned the Chartered Property Casualty Underwriter (CPCU) designation awarded by the American Institute for Property and Liability Underwriters. He served on the CPCU Consulting, Litigation and Expert Witness Section (CLEWS) governing committee from its inception in 1993 to 2011, with a few breaks for other national service. During his tenure on the CLEWS Committee he was editor of the CLEWS newsletter, and subsequently its chairman. He was elected to a three-year term to the CPCU Society's Board of Governors, and as a third year Governor was a member of the Society's Executive and Audit Committees. He was named as the first chairman of the CPCU Society's Diversity Committee serving from 2005 through 2008. In January 1998 he was awarded the "Standard Setter" Award by the CPCU Society recognizing Stan's "exemplary professionalism, work towards maintaining high ethical and professional standards in the insurance industry." At the 2009 CPCU Annual Meeting and Seminars in Denver, he was awarded the prestigious George M. Gottheimer Memorial Award for outstanding contributions to insurance education. While a member of the CLEWS Committee, Stan created fifteen separate mock trials (and participated as a cast member) that were presented by the CLEWS committee at the Society's Annual Meeting and Seminars on a myriad of insurance topics. Most noteworthy of his characters in the mock trials are Ara N. Omitian, an intrepid agent who casually noted to his clients that "everything is covered," Cyrus, "Sy" Onara, the president and CEO of Sosumi Golf and Aerospace, and W. E. Neverpeigh, the stalwart vice-president, claims, of Shifting Sands Mutual Insurance Company.

Locally, Stan served two terms as President, as well as Vice-President, and President-Elect of the District of Columbia chapter of CPCU. He has also served as the chair of the Washington Metropolitan Area All Industry (Capital I Day) since 2005. Concerned about the cost and availability to insurance agents to matriculate into the CPCU program and continue on to obtain the CPCU designation, Stan established a scholarship fund in 2000 to provide financial assistance toward the cost of classes, textbooks and exam fees. The scholarship continues today.



Stan has authored thirteen articles on various insurance topics, including the Special Relationship, and co-authored an extensive research dissertation on the Maryland Automobile Insurance Fund and residual market automobile insurance delivery systems.

Stan is a frequent lecturer to insurance agents in Maryland, the District of Columbia and Virginia on errors and omissions, ethics and professional liability. He has been an instructor for the DC chapter of the Society of CPCU since 1992 teaching the legal environment foundation course of the CPCU curriculum. In 2005, as a Member of the Foundations Subcommittee II, CPCU Advisory Committee of the American Institute for CPCU, Stan was instrumental in helping create the Legal Environment of Insurance text used by CPCU candidates working toward their designation. He has presented a comprehensive overview of litigating disputes with insurance agents and brokers to members of the Maryland State Bar Association at several of their mid-year meetings.

Stan has been an instructor for the Independent Insurance Agents of Maryland since 1993. In 1995 the Independent Insurance Agents of Maryland honored him with the President's Education Award.



Stan brings a special ability to the expert witness portion of his consulting practice. After having deposed hundreds of witnesses in E&O cases, and having tried several hundred cases, combined with an insurance background and the CPCU designation, he is very comfortable giving depositions and testifying at trial.

In 1950, during one of the larger epidemics in the United States, Stan contracted paralytic polio in his legs. Not one to give in to the disease, he eventually progressed from using crutches and leg braces to one small brace and then just special shoes. Even some of his best friends did not know about his disability. In 1984 he began to have new problems with his legs and was eventually diagnosed with post-polio syndrome. The progress he had made in recovering from his initial bout of polio began to reverse itself, ultimately requiring the part time use of a wheelchair. Not one to give in to his disability, he embraced it by being elected and serving as the president of the Polio Society of the District of Columbia in 1987 until 1991. He was also featured in the March 28, 1994 Time Magazine article "Reliving Polio" and a CBS TV

program "Eye to Eye" with Connie Chung which aired in August 1994, focusing on post-polio syndrome. In 1998 Stan retired from the active practice of law due to post-polio. He then started his consulting practice.



Spotlight Article ▶

Stanley L. Lipshultz

JD, CPCU

Preparing a report for counsel sounds simple. It is not. There are many factors that should be considered when you prepare your report, including how much information is required by the rules of the court in which the matter is pending. The Federal Rules of Civil Procedure generally require the most comprehensive disclosures to be included in a written report. Most state court rules are not too far behind. And, often, interrogatories issued by the other side's attorney require substantial disclosure of information from the expert. Thus, you should give thought to both content and substance before you write the report.

Keeping in mind that the written report will be the core of the discovery deposition, and once committed to written form, difficult to modify, considerable care and effort should go into its preparation.

What is it that you should expect to provide to the attorney who has retained you and why? Generally, once a case has begun, you will be aiding counsel in responding to interrogatories or court imposed requirements. A typical interrogatory designed to discover information about the expert's opinion might look like the following:

State the name and address of each expert whom you intend to call as a witness to testify in the instant litigation; provide a statement as to all opinions and grounds therefor each is to testify to at the time of trial; and further, attach to your Answers to Interrogatories, all reports of such expert.

Becoming more typical are the court imposed disclosure requirements. Many state courts are now modeled after the Federal Rules of Civil Procedure, Rule 26(a)(2):

(2) Disclosure of Expert Testimony.

(A) In addition to the disclosures required by paragraph (1), a party shall disclose to other parties the identity of any person who may be used at trial to present evidence under Rules 702, 703 or 705 of the Federal Rules of Evidence.

(B) Except as otherwise stipulated or directed by the court, this disclosure shall, with respect to a witness who is retained or specially employed to provide expert testimony in the case of whose duties as an employee of the party regularly involve giving expert testimony, be accompanied by a written report prepared and signed by the witness. The report shall contain a complete statement of all opinions to be expressed and the basis and reasons therefor; the data or other information considered by the witness in forming the opinions; any exhibits to be used as a summary of or support for the opinions; the qualifications of the witness, including a list of all publications authored by the witness within the preceding ten years; and a listing of any other cases in which the expert has testified as an expert at trial or by deposition within the preceding four years.

The cited federal rule is a good outline to follow for your report, whenever one is required. The catch is to balance the amount of information provided in the report to accomplish these objectives. First, limit the number of draft reports submitted for review to counsel and, thus, limit counsel's input into what is in the report. The reason is that these draft reports can be obtained through properly framed discovery requests, and you might be asked questions about each one. Second, leave some room to maneuver, to exercise judgment when you are deposed. Refrain from making blanket statements and such words as never, always, impossible, or any other phrase that leaves no room for the exceptions.

Now, how should the report be prepared? The first item below is not one that will be included in the report, but reflects a mistake many experts make. The remaining suggestions are just that, and should be used whenever they are appropriate.



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1. Resist the temptation to provide a spontaneous oral report. When you are first consulted by an attorney, you most likely will be asked to give an opinion based upon the attorney's understanding of the facts. Do not do it. Usually, you will be given only enough facts to whet your appetite, and your preliminary opinion could very well end up as the published opinion in a court document prepared by the attorney instead of you. Do not assume that the attorney who has selected you as an expert actually knows enough to give you a full overview of the facts sufficient to prepare a report. Insist on being given all of the documents, or a written set of facts from which you can provide an opinion. You must, therefore, be fully prepared to justify everything in it. If the attorney is under a time deadline (as many are), and is required to submit something in writing to satisfy a procedural requirement, insist on seeing the writing before it is given to the opposing party's attorney.

2. Begin your report with your task, followed by your opinion. Be certain you understand your task- that is, what you are expected to do on behalf of your client. If you have been requested to opine on the proper handling of a claim and whether the actions of the company could be considered bad faith, then begin the report with this information. After you have defined your task, then state your opinion. Placing your opinion at the very beginning of the report demonstrates the confidence you have in your opinion, and makes it the focal point.

3. Explain how you reach your opinions. After stating your opinion, explain the methodology that you used to reach your conclusions. Itemize the documents that you reviewed, and whenever necessary, the facts you relied upon.

4. Keep the language in your report simple and easily understood. In the event that the matter for which you have been retained proceeds to trial, you will no doubt be cross-examined by opposing counsel based upon its contents. If the report is written in an arrogant style, if the report is condescending, your language will be used against you in front of the judge or jury in an attempt to discredit your opinion. In order to be an effective expert, you must be able to communicate with the jury or judge without appearing to be arrogant or condescending. A good place to start is the written report.

5. Keep the report short and sweet. The more you say in your report, the more you will be asked by your opponent. If you stick to the basics, your task, your opinion, the facts and the documents reviewed, there will be less ground for the opposing attorney to cover with you, either in deposition or trial.

6. Select references with care. If you intend to rely upon written articles, treatises, or other works that are not part of the case record, choose them with care. Generally, it is sufficient to rely upon your education, training, and background to render an opinion. If you decide to support your opinion with additional material, be sure that the article or articles you have chosen clearly support your opinion, but are not the basis for it. Anyone can read an article and draw conclusions from it. It is your unique ability, based upon your training, background, and education, that sets you apart from all other experts.

7. Stay in your area of expertise. There are those experts who opine on any subject without the proper background. If you are not comfortable in the subject matter area, refer the matter to someone who has the requisite experience. The report that you write is not an academic exercise. It should be a practical solution to a problem presented to you as the expert, and you should always keep that in mind when you prepare to write the report and when you actually commit it to writing.

8. Write the report as a lay witness. Do not write your report as if you are an attorney. Your opinion will, in almost all cases, be the mirror image of the opponent's expert's opinion. You will opine that the actions of the company amount to bad faith. The other expert will opine that the actions do not amount to bad faith. But to state it as anything other than an opinion based upon the facts and documents of the specific case will weaken your opinion and make you appear cavalier when you are called upon to explain your opinion.

9. Ignore the other experts. You will be tempted to read both the report and deposition of the opposing expert before you begin your own tasks. Some attorneys believe this is helpful; others do not. My preference is to have the expert provide an opinion before reviewing the other expert's opinions. This keeps your opinions focused on your task instead of on the opposing expert. Granted, you are to some extent an advocate for the party who has retained you, but you should still render an objective opinion based on the facts as they have been presented to you. The more objective you are in communicating your opinion, the more credible you will appear to the finder of fact.

Annual Conference 2017 »

Planning is currently underway for the upcoming AAIMCo Conference in Seattle, Washington!

The dates are Thursday, April 27 - Saturday, April 29, 2016. The location is the historic Mayflower Park Hotel in the heart of downtown Seattle.

Members are currently able to start making their hotel reservations by calling the hotel at 1-800-426-5100. Please mention the AAIMCo 2017 Annual Conference to receive the special group rate.

Additional detail will be forthcoming, but in the meantime please mark your calendars and plan on attending!

If you would like to make a presentation at the Conference, please contact our Program Chairman, Peter Marchel, and he will put you in the lineup! If you have any questions regarding the logistics please contact Russ Taylor.

Hope to see everyone there!

