

# THE PROGRAM

## WEDNESDAY | JUNE 7, 2017

8:00 – 8:30 AM | 48th Floor  
**Registration, Breakfast & Welcome Remarks**

8:30 – 9:30 AM | 48th Floor  
**Buyers, Cellars & Wind-Downs**

It has been said that Barbara Streisand has a shopping mall in her Malibu basement. Similar surprises are normal in a world of mergers and acquisitions – you never know what the inventory of Electronically Stored Information (ESI) will reveal when the deal has closed or the doors have shut. This session will discuss the issues and risks associated with ESI management, as well as the preservation expectations companies face during the acquisition process, divestiture or bankruptcy.

### Faculty

**Seth Eichenholtz**  
MasterCard  
Head of Electronic Discovery, Operations & Technology

**Ed Gramling**  
Pfizer  
Discovery Counsel

**Daniel Kulakofsky**  
Travelers  
Associate Group General Counsel

**Joanne Lane**  
Merck & Co.  
Associate Director, IT Risk Management & Security

**Debora Motyka Jones**  
Lighthouse eDiscovery  
Vice President, Eastern Region

9:30 – 9:40 AM | 48th Floor  
**Session Shuffle**

9:40 – 10:40 AM | 48th Floor  
**Wall Street: Money in the Litigation Industry**

Private equity loves litigation and especially eDiscovery – on both sides of the “v”. This panel will discuss the effect of outside money in litigation and the eDiscovery business. The discussion will provide strategy points and illustrate the methods by which you can discover how your opponent is financing the case and how best to communicate that information to the courts.

### Faculty

**Mark Behrens**  
Shook, Hardy & Bacon LLP  
Partner

**Page Faulk**  
U.S. Chamber Institute for Legal Reform  
Vice President, Legal Reform Initiatives

**Tripp Haston**  
Bradley LLP  
Co-Chair, Life Sciences Industry Group

10:40 – 11:00 AM | 48th Floor  
**Refreshment Break**



11:00 AM – 12:00 PM | 48th Floor

## **Off Broadway: The Role of Testifying, Consulting Experts, 30(b)(6) & Fact Witnesses**

ESI depositions are the hottest show in town for requesting parties these days. All jokes aside, ESI witnesses play an important role in litigation and investigations. This panel will provide participants with the often confusing roadmap and strategies for how best to manage an ESI deposition or interview, how to define roles and how to draw the line on scope.

### **Faculty**

**Taylor Hoffman**

*Swiss Re America*

*Senior Vice President, Global Head of eDiscovery*

**Derrick C. Lee**

*OpenText Recommind*

*Discovery Specialist & Account Manager*

**Patrick Oot**

*Shook, Hardy & Bacon LLP*

*Partner*

**Florence Yee**

*The Prudential Insurance Company of America*

*Director, Corporate Counsel*

12:00 – 12:30 PM | 38th Floor

### **Luncheon**

12:30 – 1:30 PM | 38th Floor

## **Beating the Traffic: How to Staff & Set-Up a TAR Matter**

We have heard how great Technology Assisted Review (TAR) can be in litigation more times than the number of riders on the new Q Line. Yet, there has been very little discussion on how to deploy TAR in litigation. This panel will explore the best litigation strategies an ESI Liaison might use in a TAR protocol. From managing the court-ordered protocol, to assigning roles and resources, to motion practice, this panel will cover the tracks when implementing TAR.

### **Faculty**

**Charles Cohen**

*Hughes Hubbard & Reed LLP*

*Partner*

**Matt Jackson**

*Clutch Group*

*AVP & Head of US Delivery*

**Nicole Langston**

*Barclays*

*eDiscovery Manager*

**Scott Reents**

*Cravath, Swaine & Moore LLP*

*Lead Attorney, Data Analytics & eDiscovery*

**Kiriaki Tourikis**

*JPMorgan Chase & Co.*

*Vice President, Assistant General Counsel*

1:30 – 1:40 PM | 48th Floor

### **Session Shuffle**

# THE PROGRAM

## WEDNESDAY | JUNE 7, 2017

1:40 – 2:40 PM | 48th Floor

### Dealing with Sandy: Crisis Management

Whether the data has disappeared, disclosures were less than perfect, or your APAC unit just had a dawn raid, you need to be ready to handle an ESI crisis. This panel will help participants develop a strategy on how best to manage a situation when something goes wrong. We will discuss how to develop the action team, response plan and overall messaging.

#### Faculty

**Brian Chebli**

*JPMorgan Chase & Co.*

*Executive Director, Assistant General Counsel*

**Marla Crawford**

*Goldman Sachs*

*Vice President, Associate General Counsel*

**Rebecca Ebert**

*Kroll Bond Rating Agency*

*Associate General Counsel*

**Wayne Matus**

*UBS AG*

*Managing Director, Global Head of eDiscovery*

**Cathleen Peterson**

*KrollDiscovery*

*Senior Vice President, Consulting & Client Engagement*

**Kelli Stenstrom**

*Deutsche Bank AG*

*Director & Associate General Counsel*

2:40 – 2:50 PM | 48th Floor

### Session Shuffle

6 | [EDIMEETING.ORG/SUMMER](http://EDIMEETING.ORG/SUMMER)

2:50 – 3:50 PM | 48th Floor

### Freedom Tower: What You Can Do in the Clouds

More and more organizations are moving to the cloud, yet many are unprepared to make the transition. Counsel and eDiscovery teams are unfamiliar with the capabilities that exist in the tools. Join this session of cloud-users (both long-term users and newbies) for a deep discussion of what to expect for the future of discovery from the cloud.

#### Faculty

**Jamie Brown**

*Independent*

*Attorney & Legal Advisor*

**Jessica Escalera**

*Barclays*

*Global Head of Legal Discovery Operations*

**Jake Frazier**

*FTI Technology*

*Senior Managing Director*

**Tom Morrissey**

*Purdue Pharma LP*

*Senior Director, Legal Operations & eDiscovery*

**Thomas Mullane**

*United Technologies Corporation*

*eDiscovery Project Manager*

**Jack Thompson**

*Sanofi US*

*Senior Manager, eDiscovery & Legal Operations*

3:50 – 4:00 PM | 48th Floor

### Refreshment Break



4:00 – 5:00 PM | 48th Floor

## **Game Over: Ending Custodian-Based Over-Preservation Using 26(b)(1) & 37(e)**

This panel will discuss strategies, protocols and tools to help put an end to massive over-preservation. As often used, the custodian based approach to preservation retains too much, and presents too much cost and risk, particularly in the era of data-breach. This discussion will also examine how Federal Rules 26(b)(1) and 37(e) work together to allow litigants to limit over-preservation by scoping discovery properly as related to the claims and defenses in the matter, while meeting their ethical obligations.

### **Faculty**

**Melissa DeHoney**

*Novo Nordisk*

*Senior Attorney*

**Manfred J. Gabriel**

*KPMG*

*Principal, Forensic Technology Services*

**Dawson Horn**

*AIG*

*Associate General Counsel & Vice President*

**Rachel Marmor**

*Barclays*

*Global eDiscovery Counsel*

**Jeffrey Nass**

*Boehringer Ingelheim*

*eDiscovery Counsel*



*Please join us for*

## **Cocktails & Hors d'Oeuvres**

5:00 – 6:30 PM

825 8th Avenue

38th Floor

New York, NY 10019

*Hosted by:*



**- End of Program -**