

PRACTICE FOCUS

- > White Collar Defense and Investigations
- > Securities Litigation
- > Insurance Recovery
- > Business, Corporate and Commercial Litigation
- > Subprime Lending Response Team

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**PRESENTATIONS AND PUBLICATIONS**

- > *“Advisers Using Social Media in Their Businesses Must Tread Carefully,”* [Advisors4Advisors.com](#) blog entry, September 2011.
- > *Firestarter: How to Ignite Your Recruiting Without Getting Burned*, presentation to Multi-Financial Securities Corporation’s “CEO Circle” Leadership Conference, August 30, 2011.
- > *How to Prevent and Detect Employee Fraud and Theft*, presentation to management of Cleveland Ritz-Carlton Hotel, June 30, 2011.
- > *“New York High Court Gives Guidance on How Far Advisors Can Go in Assisting Their New Firm in Transitioning Accounts Without Violating Non-Solicitation Clauses,”* [Advisors4Advisors.com](#) blog entry, June 2011.
- > *How to Avoid Getting Sued When Switching Broker/Dealers*, webinar, May 2011.
- > *“Client Ownership and Switching Firms: Clients Aren’t Chattel,”* [Advisors4Advisors.com](#) blog entry, April 2011.
- > *Current Trends in Financial Advisor Regulation*, presentation to SS&G Financial Services, October 2010.
- > *No Free Lunch: Litigation Risks From Bailout Legislation*, Calfee 10th Annual Complex Litigation Seminar, August 6, 2009.
 - > *Significant Corporate and Securities Litigation Developments*, Panel Co-Chair, 14th Annual Bowne Securities Law Institute, November 19, 2008.
 - > *Securities Litigation and Enforcement Update* (Panel Co-Chair), Bowne of Cleveland Securities Law Institute, November 2008.
- > *Introduction to Securities Litigation, Enforcement and Criminal Issues*, Cleveland Metropolitan Bar Association Securities Law Bootcamp (with Virginia Davidson), November 10, 2008.
- > *“Defenses in Subprime Litigation,”* [Securities Litigation & Regulation](#) (Thompson/West Publications), Vol. 14, Issue 14, November 18, 2008.
- > *“Managing Expectations for US Adoption of IFRS,”* [Securities Law 360](#), October 27, 2008.
- > *“Risk Modeling and its Implication for Liability of Rating Agencies,”* [LEXIS Subprime Mortgage Securitization Crisis Expert Commentary Series](#), October 2008.
- > *Effective Risk Management for Financial Advisors*, client seminar, Youngstown, OH, July 2008.
- > *Effective Risk Management for Financial Advisors*, client seminar, Pittsburgh, PA, July 2008.
- > *Effective Risk Management for Financial Advisors*, client seminar, Wexford, PA, July 2008.
- > *Designing a Customized Arbitration Process for Your Organization*, Calfee 9th Annual Complex Litigation Seminar, July 2008.
- > *Effective Risk Management for Financial Advisors*, client seminar, Cleveland, OH, June 2008.
- > *Taking and Defending Effective Depositions*, Lorman Education Services seminar, April 2008.

PRESENTATIONS AND PUBLICATIONS (continued)

- > *Effective Risk Management for Financial Advisors*, client seminar, Columbus, OH, April 2008.
- > *Primer on Subprime Litigation*, Cleveland Metropolitan Bar Association, April 2008.
- > *Taking and Defending Effective Depositions*, Lorman Education Services seminar, April 2008.
- > *Primer on Subprime Litigation*, Cleveland Metropolitan Bar Association, April 2008.
- > Quoted in *Subprime Becomes Primetime at Calfee*, Crain's Cleveland Business, February 18, 2008.
- > Quoted in *Foreclosure Class Action Could Spark Copycats*, Crain's Cleveland Business, February 18, 2008.
- > *New SEC Anti-Fraud Rule Has Sweeping Implications*, Securities Law 360, October 24, 2007.
- > *New SEC Anti-Fraud Rule Impacts Hedge Funds, Private Equity Funds, Other Pooled Investment Vehicles*, Mondaq.com, October 17, 2007.
- > *SEC Closely Eyeing Private Investment Funds, Advisor Actions*, Crain's Cleveland Business, September 18, 2007.
- > *Top Tips for Avoiding Arbitration and Minimizing Exposure*, Client Presentation, May 2007.
- > *Privilege Protected with New Government Safeguards*, Baltimore Business Journal, April 13, 2007.
- > *Companies Have New Safeguards in Government Investigations*, Columbus Business First, April 13, 2007.
- > *Impact of the McNulty Memorandum on Corporate Investigations*, Cleveland Securities Law Inst., Feb. 2007.
- > *SEC's Authority Over Hedge Funds Short-Lived*, Calfee Insights, Vol. IV, Issue 3, Fall 2006.
- > *Backdated Stock Options: Strategies for Responding to Government Investigations and Shareholder Litigation--Seminar* September 22, 2006.
- > *Investigation Into Backdated Options Grants Latest Pitfall for Publicly-Trade Companies*, Crain's Cleveland Business, September 18, 2006.
- > *Investment Banking Law Update (Panel Chair)*, Cleveland Securities Law Inst., March 2006.
- > *Recent Developments in Securities Litigation and Enforcement*, Cleveland Securities Law Inst., March 2005.

PROFESSIONAL ASSOCIATIONS/COMMUNITY ACTIVITIES

- > NITA Trial Advocacy Institute faculty member.
- > FINRA (formerly NASD) Arbitrator, 2004 to present.
- > President, 1st VP, Executive Board and Board of Trustees, Cleveland Chapter of American Jewish Committee.
- > Member, AJC National Council.
- > Board of Trustees, Cleveland Jewish Federation, Young Leadership Division.
- > Board of Trustees, Gross Schechter Day School, Pepper Pike, Ohio.
- > Asst. Secretary, Trustee, and Chair-Constitutional Committee, Congregation B'Nai Jeshurun, Pepper Pike, Ohio.
- > Marcus Leadership Fellow, Congregation B'Nai Jeshurun, Pepper Pike, Ohio.
- > Shalom Comay Fellow, American Jewish Committee (National), 2005.

AWARDS AND HONORS

- > Ohio Super Lawyer Rising Star, 2005, 2006, 2007.
- > Starfish Champion Volunteerism Award, City Year, 2003.
- > Max Freedman Young Leadership Award, Cleveland Chapter of American Jewish Committee, 2003.