



**Hon. Ralph Artigliere (ret.)**

*Ralph Artigliere LLC, Clemson, SC, USA*

Judge Artigliere retired as a Circuit Judge from Florida's Tenth Judicial Circuit to teach and write. Before his appointment to the bench in 2001, Judge Artigliere was in private practice where he tried primarily professional negligence, medical malpractice, and product liability cases. He is a Fellow of the American College of Trial Lawyers. As a circuit judge from 2002-08, he served in the felony, family, probate, and civil trial divisions, and was Administrative Judge of the Circuit's civil and family divisions. Judge Artigliere teaches in the Florida Judicial Colleges and continuing judicial and legal education programs nationally. He served on The Florida Bar Civil Procedure Rules Sub-Committee that drafted and presented the electronic discovery amendments that were adopted by the Florida Supreme Court in 2012. Among his published work, Judge Artigliere is a co-author of the book *Florida eDiscovery and Evidence* available from LexisNexis and The Florida Bar. Artigliere is an active member of multiple Sedona Conference Working Groups and is the Chair of the acclaimed Sedona Conference annual programs on Cooperation and Negotiation in eDiscovery.

**Stacey Ellen Blaustein**

*IBM, Armonk, NY, USA*

Stacey is a Senior Attorney in the Corporate Litigation Department of IBM Corporation, where she manages all aspects of E-Discovery, including E-Discovery in international and domestic cases, setting policies and processes, and ensuring compliance with best practices. She is integrally involved in Cross-Border Discovery and Data Privacy issues, such as GDPR implementation for Corporate Litigation and the effect of GDPR on Records Management. Stacey handles third party (non-IP) subpoena practice and aspects of regulatory requests. Before joining IBM, she practiced for more than eighteen years as a securities litigation attorney. She is an active member of The Sedona Conference Working Group 6 on International Electronic Information Management, Discovery and Disclosure (WG6), a member of the Electronic Discovery Institute Faculty, and served on the Planning Board for the ABA TechShow. Stacey is a graduate of Barnard College of Columbia University, and the Emory University School of Law.

**Kevin F. Brady**

*Volkswagen Group of America, Herndon, VA, USA*

Kevin has extensive experience providing advice and counsel on electronic discovery, electronic information management, data privacy, and data security issues. He also advised companies on records retention and information governance programs, compliance with eDiscovery demands, and the development and implementation of policies and procedures related to the deployment of technology solutions. In addition to

---

FACULTY

having served as an expert witness and Special Discovery Master on issues related to electronic discovery, Kevin lectures and publishes extensively in the areas of eDiscovery, records management, data privacy, data security, attorney competence, and legal ethics. Kevin received a J.D. from Widener University School of Law (magna cum laude), an M.B.A. from Widener University, and a B.A. from the University of Delaware. He serves as Chair Emeritus of The Sedona Conference Working Group 1 on Electronic Document Retention and Production (WG1) Steering Committee. Kevin is also Co-Chair Emeritus of the Georgetown University Law Center's Advisory Board for the Advanced E-Discovery Institute and former Co-Chair of the Delaware Supreme Court's Commission on Law and Technology. He is a founding member and Past President of the Richard K. Herrmann Technology Inn of Court in Wilmington, Delaware.

**Vincent M. Catanzaro**

*FedEx, Philadelphia, PA, USA*

Vince is Senior Counsel at Federal Express Corporation, where he is responsible for providing eDiscovery and legal technology support to litigation teams and eDiscovery program managers and for maintaining, enhancing, and providing strategic guidance regarding eDiscovery tools, protocols, and best practices. Prior to this, Vince was counsel at two international law firms, where he worked with clients to develop best practices and untangle issues related to data preservation, litigation management, and international and cross-border collection. Before returning to private practice, Vince served as Senior Counsel, Global Discovery Manager for E. I. du Pont de Nemours and Company. He was responsible for guiding and supporting the legal teams in the development of eDiscovery response strategies and the use of litigation technology and overseeing DuPont Legal's Discovery Excellence Center, which was named one of Inside Counsel Magazine's Top 10 Innovative Legal Departments for 2013. Prior to joining DuPont, Vince practiced in suburban Philadelphia, where he concentrated on Construction Litigation at the state and federal level. He represented a diverse client base from industry suppliers to individual contractors in contract disputes, design interpretation, zoning matters, and sales agreements.

**Suzanne Clark**

*Beasley Allen, Mobile, AL, USA*

Suzanne is a graduate of the University of Florida College of Law, and is Of Counsel at Beasley, Allen, Crow, Methvin, Portis & Miles, P.C. where she serves as Discovery Counsel for the firm's Mass Torts Section, assisting with discovery advocacy and evidence management, especially discovery and management of electronically stored information (ESI). Suzanne works remotely from Jacksonville, Florida, for the firm's Montgomery, Alabama office. After graduating law school in 2002, Suzanne practiced in the area of commercial litigation, and

in 2013 she entered the field of eDiscovery. Since 2017, Suzanne has focused her eDiscovery legal practice on the Plaintiff's side, serving as Discovery Co-counsel assisting merits counsel with discovery advocacy and evidence management in mass torts litigation. She has also taught eDiscovery at Samford University, Cumberland School of Law, through the fully online Master of Studies in Law program. Suzanne has earned the Certified eDiscovery Specialist designation from the Association of Certified eDiscovery Specialists (ACEDS).

**Hon. John M. Facciola (ret.)**

*Georgetown Law, Alexandria, VA, USA*

Judge Facciola was appointed a United States Magistrate Judge for the District of Columbia in 1997. He retired from the bench in 2015 and is now an adjunct professor of law at Georgetown Law where he teaches Information Technology and Modern Litigation, Evidence, Contracts, and Professional Responsibility. While a judge, he authored over 700 opinions, many in the areas of electronic discovery. Judge Facciola is a frequent lecturer on that subject and The Sedona Conference has awarded him its Lifetime Achievement Award. The Bar Association named him its Judge of the Year. He is also the former Editor-in-Chief of The Federal Courts Law Review, the electronic law journal of the Federal Magistrate Judges Association. Judge Facciola's most recent publication—coauthored with Kimberly Williams, Peter McCann, and Vincent M. Catanzaro—is The Legal Technology Guidebook (Springer 2017).

**Phil Favro**

*Driven, Inc., Alpine, UT, USA*

Philip Favro is a Chambers-ranked lawyer who serves as a trusted advisor to organizations and law firms on issues relating to electronic discovery and information governance. Phil serves as a special master and an expert witness on cases involving electronic discovery. He is also a nationally recognized thought leader and legal scholar on the discovery process. Phil actively contributes to The Sedona Conference, where he serves as a member of the Steering Committee for Working Group 1 (Electronic Document Retention and Production). Phil has led various Sedona drafting teams, including the Primer on Social Media, Second Edition (2019) and the Commentary on Proportionality in Electronic Discovery (2017). He is presently serving as the editor-in-chief for The Sedona Conference Commentary on Ephemeral Messaging (2021) for Working Group 6 (International Electronic Information Management, Discovery and Disclosure).



The Sedona Conference Institute Presents:  
eDiscovery Negotiation Training: Practical Cooperative Strategies

Online (Zoom)  
March 29-31, 2022

---

FACULTY

---

**Hon. Paul W. Grimm**

*U.S. District Court for the District of Maryland, Greenbelt, MD, USA*

Judge Grimm serves as a District Judge for the United States District Court for the District of Maryland. He was appointed to the Court as a District Judge on December 10, 2012. Previously, he was appointed to the Court as a Magistrate Judge in February 1997 and served as Chief Magistrate Judge from 2006 through 2012. In September 2009, the Chief Justice of the United States appointed Judge Grimm to serve as a member of the Advisory Committee for the Federal Rules of Civil Procedure. Judge Grimm also chairs the Advisory Committee's Discovery Subcommittee. In these capacities, he has participated in drafting proposed changes to the federal rules of civil procedure, including Rule 37(e). Additionally, Judge Grimm is an adjunct professor of law at the University of Maryland Francis King Carey School of Law, where he teaches courses on evidence and discovery. Judge Grimm has written extensively on both topics.

**Tor Gronborg**

*Robbins Geller Rudman & Dowd LLP, San Diego, CA, USA*

Tor is a member of the Firm's Management Committee. He has served as lead or co-lead counsel in numerous securities fraud cases that have collectively recovered more than \$1 billion for investors. He earned his Bachelor of Arts degree from the University of California, Santa Barbara, and his Juris Doctor degree from the University of California, Berkeley, where he was a member of the Moot Court Board. In addition to his successful securities litigation practice, he lectures on topics such as the Federal Rules of Civil Procedure and electronic discovery.

**Mary Rose Hughes**

*Perkins Coie LLP, Washington, DC, USA*

Mary Rose is a corporate commercial litigator. She has extensive experience representing aviation, energy, telecommunications and manufacturing clients in state and federal courts and in state regulatory proceedings and arbitrations throughout the United States. Mary Rose co-founded the electronic discovery practice at Perkins Coie and has served on the faculty of the Sedona Conference's eDiscovery Negotiation Training Program for a number of years. Previously, Mary Rose served as the U.S. Department of State Deputy Assistant Secretary of State for Environmental, Health and Natural Resources where she managed international environmental negotiations and chaired the U.S.-Panama Joint Committee on the Environment.

**Edward Jacobs**

*BakerHostetler, New York, NY, USA*

Ted is a partner at BakerHostetler, where he serves as national lead counsel for the firm's E-Discovery, Advocacy & Management team (EDAM). In addition to representing clients in connection with complex commercial and financial litigation, Ted is responsible for the strategic management of discovery across all the legal actions initiated by Irving H. Picard, the court-appointed Securities Investor Protection Act Trustee, in connection with the liquidation of Bernard L. Madoff Investment Securities LLC. He also oversees EDAM's role providing e-discovery expertise to BakerHostetler's Chambers-ranked Privacy and Data Protection team, and handles data management, preservation, and productions across cybersecurity incidents, regulatory inquiries, and litigation. A graduate of Colgate University, Harvard Divinity School and Georgetown University Law Center, Ted has taken on significant pro bono representations in furtherance of LGBT equality. He serves on the board of Urban Word NYC.

**Hon. Kimberly C. Johnson**

*U.S. District Court, Eastern District of Texas, Plano, TX, USA*

Kimberly C. Priest Johnson was appointed as a United States Magistrate Judge in 2016. Prior to joining the judiciary, Judge Johnson clerked for the Honorable Barbara M.G. Lynn. After her clerkship with Chief Judge Lynn, she practiced with both international and boutique law firms, including her own firm, where she focused on complex business and commercial litigation and federal criminal defense. Judge Johnson also represented indigent defendants as a member of the Criminal Justice Act Panel for both the Eastern and Northern Districts of Texas. In addition, Judge Johnson served as a Special Assistant United States Attorney in the Northern District of Texas, where she prosecuted white collar crimes. Judge Johnson is an adjunct professor at Southern Methodist University Dedman School of Law, where she has taught Trial Advocacy and Pre-trial Practice and Advocacy, a class she designed and added to the law school's curriculum. She also teaches an intensive trial program at Notre Dame School of Law. Judge Johnson serves as co-chair of the Federal Magistrate Judges Association Diversity and Civic Outreach Committee and member of the Federal Magistrate Judges Association MJSTAR Committee. She also serves on the boards of the Eastern District of Texas Women's Association and the Dallas Association of Women Lawyers. Judge Johnson and her husband Brett, have five children, ages 19, 15, 13, 12, and 10.

**Rose J. Jones**

*King & Spalding, Atlanta, GA, USA*

Rose is a Partner and King & Spalding's Global Director of e-Discovery Project Management and Technology and co-leads the firm's E-Discovery practice which was identified as one of the top e-discovery and information governance practices in the country by Chambers USA and Legal 500. She has been ranked by Chambers USA as one of the nation's top lawyers in e-discovery litigation practice. Her practice focuses on e-discovery with particular expertise in global e-discovery protocol development and implementation, international e-discovery issue counseling and guidance on selection and implementation of e-discovery technology. Rose has extensive experience representing clients as the lead e-Discovery lawyer in complex investigations and litigations and serving as global eDiscovery counsel for clients providing strategic advice and oversight on all investigations and litigations.

**Karen E. Keller**

*Shaw Keller LLP, Wilmington, DE, USA*

Karen's practice primarily focuses on intellectual property litigation in federal courts across the country and at the International Trade Commission. In addition to serving as a member of The Sedona Conference Working Group 10 on Patent Litigation Best Practices (WG10, Karen is the President Emeritus of the Delaware Chapter of the Federal Bar. In late 2012, Chambers USA Women in Law recognized Karen's work by nominating her for its 2013 Up and Coming Intellectual Property Lawyer of the Year Award and she has been consistently ranked in the past few years by Chambers, the IAM Patent 1000 and Super Lawyers. She has a B.S. in Biochemistry and Molecular Biology, and worked at GlaxoSmithKline conducting drug discovery research. Karen prosecuted patent and trademark applications and worked on other intellectual property litigation matters at an intellectual property boutique firm in Philadelphia and at one of Delaware's largest law firms before founding Shaw Keller LLP in 2011.

**Hon. Tanya R. Kennedy**

*Appellate Division, First Department, Supreme Court of the State of New York, New York, NY, USA*

Hon. Tanya R. Kennedy is an Associate Justice of the Appellate Division, First Department. She is also the former Supervising Judge of Civil Court, New York County, and a former Adjunct Professor at Fordham University School of Law. Justice Kennedy is a member of the Board of Directors of the New York City Bar Association; Executive Committee Member of the Women in Law Section of the New York State Bar Association; Board Member of the Supreme Court Justices Association of the City of New York, Inc.; and member of the Committee on Pattern Jury Instructions of the Association of Supreme Court Justices of the State of New York. In addition,



she is a member of the Board of Overseers of the Benjamin N. Cardozo School of Law, where she received her law degree, and is an Advisory Board Member of Penn State Law. Justice Kennedy is also the Past President of the National Association of Women Judges (NAWJ). A frequent speaker at various conferences, she has received numerous professional achievement awards.

**Richard Lutkus**

*AlixPartners, New York, NY, USA*

Richard assists enterprises with complex technological issues related to digital forensic investigations, cybersecurity, and electronic discovery. He combines his 13 years of Am Law 50 litigation law practice as a multijurisdictionally barred attorney together with technical mastery to help clients better navigate the challenges of modern business. Richard is the only barred attorney in the world that holds a combination of deeply technical industry certifications as a certified digital forensic expert, ethical hacker, and eDiscovery practitioner. Richard has helped dozens of clients with data-related issues such as remote rapid response digital investigations, insider threat mitigations and investigations, trade secret misappropriation, IP theft, and litigation response. Richard has a JD from Creighton University School of Law, and also holds the EnCE, EnCEP, and CEH technical certifications.

**Hon. William Matthewman**

*U.S. District Court, Southern District of Florida, West Palm Beach, FL, USA*

U.S. Magistrate Judge William Matthewman was appointed to the federal bench in 2012. He sits in the West Palm Beach division of the United States District Court for the Southern District of Florida. As a U.S. Magistrate Judge, he handles both civil and criminal cases, and has presided over numerous discovery disputes including ESI discovery disputes. He has spoken on discovery issues at the University of Florida e-discovery conference and before various bar associations and conferences. Prior to joining the bench, Judge Matthewman was a very active trial attorney who handled both criminal and civil cases. He is AV rated by Martindale Hubbell and has been a member of The Florida Bar and a trial lawyer since 1983. As a trial attorney, he handled numerous federal capital cases in various jurisdictions and tried many high profile, lengthy state and federal cases. Prior to being appointed to the bench, he was an associate and partner in litigation firms, and he was also a sole practitioner during his career. Before becoming an attorney, he was a police officer in Miami, Florida.

**Paul H. McVoy**

*Meta-e Discovery, Milford, CT, USA*

Paul is the co-founder and CEO of Meta-e Discovery LLC, a company that is driven to leverage technology on behalf of its clients. Paul has been at the forefront of discovery for 24 years, working on matters for both

individuals in small cases as well as large, complex litigations. He was an early adopter of technology-assisted review and has been a vocal advocate in support of its use ever since. Paul is an active member of The Sedona Conference Working Group 1 on Electronic Document Retention and Production (WG1) and the editor of The Sedona Conference Glossary, 5th edition. He has also been recognized by Chambers as a Trusted Advisor for Ediscovery in 2018, 2019 and 2020.

**Jason L. Molder**

*Hill Ward Henderson, Franklin, TN, USA*

Jason is Senior Counsel at Hill Ward Henderson, where he leads the eDiscovery & Information Governance Group. He focuses his practice on construction and design contracts, electronic discovery, digital accessibility, and select areas of information technology law. Jason's eDiscovery practice spans all areas of electronically stored information and includes policy development; litigation readiness; legal holds; vendor selection; early case assessments; the collection, processing, search, review, and production of ESI; and eDiscovery risk assessments. Jason also offers outside eDiscovery co-counsel services to other law firms, at both the pre-trial and trial stages, in all areas involving ESI. On the consulting side, Jason offers eDiscovery and technology consulting services, in areas such as bringing eDiscovery in-house, software selection, project management, protocol and procedure development, and more. Jason is admitted to practice law in Florida and Tennessee and is based in Tennessee.

**David Moncure**

*DaVita, Denver, CO, USA*

David is VP / Associate General Counsel Information Lifecycle Governance for DaVita. He oversees all aspects of information governance and eDiscovery globally for DaVita as well as assisting with data security and protection compliance. Prior to joining DaVita, David served as International eDiscovery and Data Privacy Counsel for Shell Oil Company. He advised Shell businesses and functions on international eDiscovery issues, data breach response situations, IT security, and various other data privacy and cybersecurity related issues. He began his practice at Norton Rose Fulbright, where he assisted clients with eDiscovery, information governance, and data privacy issues. David's practice spans work throughout the US, EU, Latin America, Middle East, and APAC. He is a frequent speaker and author of numerous articles on eDiscovery and data protection issues, particularly on cross-border issues. David is Chair Emeritus of the Steering Committee of The Sedona Conference Working Group 11 on Data Security and Privacy Liability (WG11) and also is an active member of Working Group 1 on Electronic Document Retention and Production (WG1) and Working Group 6 on International Electronic Information Management, Discovery and Disclosure (WG6).



**Jonathan Monheit**

*Microsoft, Redmond, WA, USA*

Jonathan began the first nine years of his legal career as a commercial litigator in Maryland before becoming an eDiscovery professional. He has spent the last five years working in Microsoft's Litigation Group as part of a team managing eDiscovery for complex litigation and government investigations. Jonathan has played an active role working within the Litigation group at Microsoft to establish eDiscovery standards that mitigate privacy risks and reduce costs, including drafting model protective orders and ESI orders to be used as a baseline in negotiations with opposing counsel. Jonathan is also responsible for standardizing the document review process Microsoft uses with outside counsel and vendors. Before joining Microsoft, Jonathan was the VP of eDiscovery Services at Hudson Legal, where he oversaw a team of project managers in the US and the UK. In his role at Hudson Legal, Jonathan directly or indirectly oversaw management of hundreds of document reviews for a variety of large companies across numerous industries in the US and UK.

**Veronica M. Nelson**

*JPMorgan Chase, Newark, DE, USA*

Veronica has extensive experience representing and supporting clients regarding legal issues in the connected e-discovery, information governance, and privacy space. She has supported clients as a litigation associate, a consultant, and currently as in-house counsel. Veronica's practice as an associate primarily focused on representing financial institutions, healthcare systems, and consumer product manufacturers. As a consultant, she developed solutions for legal obligations related to reactive and initiative-taking data management, including collaborating with legal and technical teams to create playbooks and strategies for responding to litigation and compliance requirements. In her current role as Vice President and Assistant General Counsel at JPMorgan Chase, Veronica implements e-discovery strategies and legal best practices for enforcement matters and internal investigations. She continues to build her knowledge and skill set by teaching courses and developing content for industry programs and events. Veronica attended Northwestern University and Howard University School of Law. Veronica has extensive experience representing and supporting clients regarding legal issues in the connected e-discovery, information governance, and privacy space. She has supported clients as a litigation associate, a consultant, and currently as in-house counsel. Veronica's practice as an associate primarily focused on representing financial institutions, healthcare systems, and consumer product manufacturers. As a consultant, she developed solutions for legal obligations related to reactive and initiative-taking data management, including collaborating with legal and technical teams to create playbooks and strategies for responding to litigation and compliance requirements. In her current role as Vice President and Assistant General Counsel at JPMorgan Chase, Veronica implements e-discovery strategies and legal best

practices for enforcement matters and internal investigations. She continues to build her knowledge and skill set by teaching courses and developing content for industry programs and events. Veronica attended Northwestern University and Howard University School of Law.

**Hon. Nan R. Nolan (ret.)**

*Redgrave LLP, Chicago, IL, USA*

During her 14 years as a United States Magistrate Judge, Judge Nolan presided over numerous complex, federal cases at every phase of civil litigation. Her work on these cases ranged from supervision of pretrial discovery and mediation in settlement conferences, to presiding over bench and jury trials where parties had consented to her jurisdiction. From the earliest days of her judicial career, Judge Nolan emphasized mediation and settlement as a primary means of resolving disputes. She mediated over 1,500 cases while on the federal court. Her unique ability to empathize with individuals from all walks of life enables her to keep dialogue open in heated disputes. Judge Nolan is a nationally recognized expert in electronic discovery and co-founded the Seventh Circuit's E-Discovery Pilot Program. She is a member of the Advisory Board for The Sedona Conference and a member of the Georgetown University Law Center E-Discovery Advisory Board. Her many lectures and workshops on e-discovery over recent years reflect her philosophy that cooperation between parties is the principal avenue to mutually beneficial solutions.

**Timothy M. Opsitnick**

*TCDI, Cleveland, OH, USA*

Tim is Executive Vice President and General Counsel, Technology Concepts & Design, Inc. (TCDI). His consulting practice focuses on electronic discovery, cybersecurity, data privacy, and computer forensics. Tim has conducted numerous continuing legal education seminars, written articles, and contributed to publications regarding electronic discovery, cybersecurity, and other technology issues. In addition, he has served as a court-appointed Special Master and as an expert witness. Tim serves on the Steering Committee for The Sedona Conference Working Group 1 on Electronic Document Retention and Production, and he is also a member of Sedona Working Groups 6 and 11. Tim was an editor of *The Sedona Guidelines: Best Practice Guidelines & Commentary for Managing Information & Records in the Electronic Age* (Second Edition 2007), a contributor to *The Sedona Principles: Best Practice Recommendations and Principles Addressing Electronic Document Production* (2004 and Second Edition 2007), a member of the drafting team for *The Sedona Principles, Third Edition: Best Practices, Recommendations & Principles for Addressing Electronic Document Production* (2017), and one of the WG1 Steering Committee Liaisons and Editors-in-Chief, *The Sedona Conference Commentary on Legal Holds, Second Edition: The Trigger & The Process* (2019). Tim is also a member and serves as the WG1

Steering Committee Liaison to The Sedona Conference Technology Resource Panel. Tim is a member of the Advisory Board for Georgetown University Law Center's Continuing Legal Education for the development of programs for its E-Discovery Institute, and a Member of the Advisory Council for EDRM, Duke Law Center, Bolch Judicial Institute.

**Hon. Andrew J. Peck (ret.)**

*DLA Piper, New York, NY, USA*

Judge Peck served for 23 years as a U.S. Magistrate Judge for the Southern District of New York, including a term as Chief Magistrate Judge from 2004 to 2005. Before his appointment to the bench, Judge Peck was in private practice for 17 years, focusing on commercial and entertainment litigation, including copyright and trademark matters, with extensive trial experience. As Senior Counsel at DLA Piper, Judge Peck advises on innovative and efficient solutions to the challenges of information management, both within and outside the litigation context. He frequently speaks at conferences concerning eDiscovery issues. Judge Peck is also available to serve as an arbitrator, mediator and Special Master. Judge Peck is recognized internationally for bringing electronic discovery competency to the attention of both the judiciary and bar. Indeed, he is widely described as the first judge to tackle the subject of eDiscovery head on, most notably in the influential 1995 decision *Anti-Monopoly v. Hasbro*, in which Judge Peck found that "it is black letter law that computerized data is discoverable if relevant." Also among his legacy rulings is the 2011 employment class action *Monique Da Silva Moore, et. al. v. Publicis Groupe & MSL Group*, the first judicial decision approving the use of technology-assisted review. In March 2018, the New York Law Journal called Judge Peck "one of e-discovery's most influential figures." Among the honors he has received, American Lawyer named him to its list of the Top 50 Innovators of the Last 50 Years as its Judicial E-Discovery Innovator. He is ranked in eDiscovery in both Chambers and Legal500. Judge Peck has been appointed Judicial Emeritus of the Working Group 1 on Electronic Document Retention and Production (WG1) Steering Committee.

**Daniel Rupprecht**

*iDS, Ltd, London, UK*

Daniel is a Director with iDiscovery Solution's European division and a qualified US attorney having practiced in both the United States and Europe. Through much of his career, Daniel was a member of a team of lawyers dedicated to the delivery of technological solutions within an international law firm, gaining considerable expertise on some of the largest global investigations. From his time in practice to the transition into the eDiscovery service industry, Daniel successfully advised and managed high-profile projects through all phases of the EDRM process. More specifically, he has provided guidance on large scale document reviews related to

phase 2/second requests, cartel/abuse/state aid investigations, internal investigations, multijurisdictional complex litigations, and banking-related matters. A true citizen of the world, Daniel was born in Germany, raised in Canada, educated in America and has now lived over 10 years split between Belgium and the UK, bringing him back to his family roots.

**Christopher Michael Schultz**

*Baylor Law School, Dallas, TX, USA*

Chris serves as an Adjunct Professor in Baylor University School of Law's Executive LL.M. Program in Litigation Management. He also serves as a Trial Advocacy Lecturer in Baylor Law's J.D. Trial Advocacy Program. Chris previously spent nearly two decades as a commercial and intellectual property litigator with Perkins Coie LLP, an Am Law 50 firm where he founded and co-chaired one of the first full-service eDiscovery practice groups in the country. Thereafter, he was appointed Executive Vice President and General Counsel of Level 2 Legal Solutions where he served as the chief legal officer. A dedicated member and long-time supporter of The Sedona Conference, Chris was a contributing editor of Sedona's groundbreaking Case for Cooperation "Brandeis Brief" journal article. He currently co-chairs and serves as a faculty member for The Sedona Conference Institute's eDiscovery Negotiation Training program.

**Joseph A. Tate**

*Cozen O'Connor, Philadelphia, PA, USA*

Joe focuses his practice on eDiscovery, information governance and data management issues in the context of litigation and investigations. As the director of Electronic Discovery and Practice Advisory Services (ePAS), Joe leads the firm's eDiscovery efforts, and is responsible for the day-to-day management of a team of attorneys and technologists that handle all phases of the eDiscovery lifecycle. Joe has extensive experience leading the eDiscovery element of meet and confer conferences, preparing and negotiating ESI protocols, drafting and responding to discovery motions and requests, and taking and defending depositions of IT personnel and record managers. He also regularly counsels clients and colleagues on complex legal issues related to eDiscovery, the attorney-client privilege and work product doctrine, information governance, and litigation readiness.

**Paul D. Weiner**

*Littler Mendelson P.C., Philadelphia, PA, USA*

Paul is a shareholder and serves as National eDiscovery Counsel for Littler Mendelson P.C., where he marries technology skills, litigation experience, and deep subject matter knowledge to bring cutting-edge solutions to both the technical and legal aspects of eDiscovery. He leads a team of eDiscovery lawyers, litigation support project managers, developers, data analysts and database administrators who provide targeted advice, strategy,



**The Sedona Conference Institute Presents:  
eDiscovery Negotiation Training: Practical Cooperative Strategies**

**Online (Zoom)  
March 29-31, 2022**

**FACULTY**

---

and hands-on litigation assistance to Littler's clients and over 1,600 lawyers practicing in Littler's 86 offices across the globe. He built and manages the Littler National Data Center, which handles electronic evidence processing and hosting activities. Paul serves as the Co-Chair of the Advisory Board of the Georgetown Law Global Advanced eDiscovery Institute and on The Sedona Conference Working Group Series Leadership Council (having served multiple terms on the Steering Committee of WG1), and is one of a select group of lawyers ranked for eDiscovery by Chambers USA: America's Leading Lawyers (one of seven in Band 1), Chambers & Partners Global, and Who's Who Legal: Litigation. Based upon his innovative approaches to complex issues, Paul has been appointed as an eDiscovery Special Master in state and federal courts and also serves as Chair of the Littler's Innovation Council, which is tasked with reengineering the traditional practice of law to bring clients cost-effective and forward-thinking solutions that employ leading-edge technology, project management skills and alternative pricing strategies, and helped spearhead the development of the firm's award-winning Littler Pay Equity Assessment™.