

Hon. Stewart D. Aaron

U.S. District Court, Southern District of New York, New York, NY

Judge Aaron was sworn in as a U.S. Magistrate Judge in the U.S. District Court for the Southern District of New York on December 1, 2017. Before joining the Court, he was a partner at Arnold & Porter LLP, where he served as the Managing Partner of the New York Office (2012-2015) and the Administrative Partner of the New York Office (2005-2012). Judge Aaron had litigated commercial and civil rights cases in federal and state court, as well as other tribunals, for over 30 years. He is a past President of the New York County Lawyers Association and a past President of the New York American Inn of Court. Judge Aaron currently serves on the Judicial Conference Committee on Information Technology. He graduated summa cum laude from Syracuse University College of Law and received his Bachelor of Science from Cornell University.

Kelly Atherton

Norton Rose Fulbright, Minneapolis, MN

Kelly is the Senior Manager of Cyber Incident Response at Norton Rose Fulbright. She has prior experience practicing complex business litigation in state and federal courts and as a director with eDiscovery services providers specializing in TAR, analytics, privilege, and managed review. She is CEDS certified, a Relativity Expert, and a Brainspace Analyst and Administrator. Kelly holds a B.A. with honors in Politics & Government from the University of Puget Sound and a J.D. from Willamette University College of Law, where she was the Editor-in-Chief of the *Willamette Journal of Internal Law and Dispute Resolution* and the Note and Comment Editor of the *Willamette Law Review*.

Rebekah Bailey

Nichols Kaster, PLLP, Minneapolis, MN

Rebekah is a partner at Nichols Kaster, PLLP, in Minneapolis where she represents employees, students, and consumers in class actions and relators in qui tam litigation. She has obtained successful results on behalf of her clients in state and federal courts across the country, as well as in arbitration. Rebekah chairs her firm's eDiscovery committee, developing and implementing internal eDiscovery policies, procedures, and tools. She is a founding member of the firm's civil rights and impact team and consumer class action group, and she has served as a member of the firm's National Wage and Hour Team. Rebekah has spoken at national conferences on various topics such as electronic discovery, arbitration, equal pay, and various wage and hour issues.

Lilith Bat-Leah

Driven, Inc., New York, NY

Lilith is a Consultant and Director of Data Science and AI Strategy at Driven, Inc. She has extensive experience managing, delivering, and consulting on eDiscovery, including identification, preservation, collection, processing, review, analysis, and production of digital data. She also has experience in research and development of eDiscovery software. Lilith is a regular participant in negotiations around eDiscovery and has

provided expert testimony in domestic and international court proceedings. She specializes in the application of statistics, analytics, machine learning, and data science within the context of eDiscovery. Lilith writes and speaks on various topics, including ESI protocols, statistical sampling, and technology-assisted review. She serves on the EDRM Advisory Council, the ACEDS New York Chapter board and is a member of Sedona Conference Working Group 1. Lilith was also a founding board member of the ACEDS Chicago Chapter. She is a graduate from Northwestern University, magna cum laude, and has been a Certified E-discovery Specialist since 2015.

Kevin F. Brady

Volkswagen Group of America, Herndon, Va.

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 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.

Hon. J. Philip Calabrese

U.S. District Court, Northern District of Ohio, Cleveland, OH

Judge Calabrese was confirmed to serve on the U.S. District Court for the Northern District of Ohio in December 2020. Previously, he served on the state trial court in the Cuyahoga County Court of Common Pleas. Before taking the bench, he had a complex litigation practice for nearly two decades and was a partner at what is now Squire Patton Boggs and at Porter, Wright, Morris & Arthur, LLP, where he co-chaired the firm's class action practice. After graduating from Harvard Law School, Judge Calabrese began his legal career as a law clerk to Judge Alice M. Batchelder of the United States Court of Appeals for the Sixth Circuit. He also serves as an adjunct professor at Case Western Reserve University School of Law, where he teaches an advanced course on expert evidence.

Vincent M. Catanzaro

FedEx, Philadelphia, PA

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.

Scott Clary

Ernst & Young, LLP, Houston, TX

Scott is a Principal in Ernst & Young LLP's Forensic & Integrity Services practice and leads the eDiscovery business for the Americas. He has over 20 years of Big 4 experience in eDiscovery, data analytics, incident response and digital forensics. As the eDiscovery leader, Scott responds to the needs of EY's clients both locally and globally by building and leading teams with diverse backgrounds and guiding them through delivery of exceptional client service. His comprehensive end-to-end understanding of the electronic discovery lifecycle has positioned him to lead complex global matters for many Fortune 500 companies and their counsel. Scott serves on EY's Diversity & Inclusiveness council, where he specifically focuses on gaining greater inclusion of special needs individuals in the marketplace. Scott sits on the board of the Leukemia & Lymphoma Society's Gulf Coast chapter.

Jennifer Coleman

Hopkins & Carley, ALC, San Jose, CA

Jennifer is a shareholder of Hopkins & Carley, and a member of Hopkins & Carley's Intellectual Property Practice and Employment and Labor Law Department. As a trial lawyer, Jen represents clients in complex litigation cases, including patent, copyright, trademark, and trade secret litigation. Jen has been involved in cases with diverse technologies, such as: automotive air intake and air filtration systems; conical crushers; digital picture frames; DRAM; financial business methods; flash memory; laser microscopes and solid immersion lenses; operating system and application software, firmware, and hardware; phenolic resins; time-stamped geospatial digital controls; wireless 802.11 a/b/g/n standards and systems; real-time web transactions

from web applications and wireless modems; Solaris OS, patches, and accompanying firmware; and RF technology. Jen also has significant experience with federal and state court e-discovery issues, has received a LPM LaunchPad™ Certificate in Fundamentals of Legal Project Management and an Advanced Certificate of Achievement for the Legal Project Management Advanced Course, and is a member of Steering Committee for The Sedona Conference Working Group on Electronic Document Retention & Production (WG1) and a member of The Sedona Conference Working Group on Trade Secrets (WG12). Jen was also an Adjunct Professor at Golden Gate University School of Law, teaching eDiscovery.

Andrea D'Ambra

Norton Rose Fulbright, New York, NY

Andrea is a partner in the New York office of Norton Rose Fulbright, where she heads the EDiscovery and Information Governance Group for the United States. Her practice focuses on eDiscovery, information management, data privacy, and cross-border discovery. Andrea counsels clients on preservation and data management issues, and has drafted information governance and records management policies for a number of multinational companies. In addition to counseling, she has assisted clients in navigating foreign data privacy laws while complying with U.S. discovery obligations. Andrea served for over seven years as an officer in the United States Navy. Her diverse Naval experience includes serving as an action officer for high-profile investigations within the Bureau of Naval Personnel and managing the administrative and legal issues of the Navy's computer network defense command. Andrea also is an adjunct professor of law at Temple Law School and William and Mary School of Law, where she teaches classes on Electronic Discovery. She received her B.S. in Political Science from the United States Naval Academy and her J.D. from William and Mary School of Law.

Anthony M. DiSenso

New York City Law Department, New York, NY

Anthony is a Senior Counsel in the New York City Law Department's E-Discovery Group (EDG). The EDG works with client agencies and Law Department case teams to promote efficient, cost-effective, and defensible strategies and workflows related to electronic discovery. Anthony is a 2010 graduate of Cornell Law School where he was a managing editor of the Cornell Journal of Law and Public Policy, and an Honors Fellow in the school's legal writing program. He began his career in the New York office of Winston & Strawn LLP and joined the Law Department's Special Federal Litigation Division in 2011. Anthony joined the EDG in 2017 and is a member of the Law Department's E-Discovery Committee. He is also a member of The Sedona Conference Working Group 1 on Electronic Document Retention and Production (WG1).

Kimberly Duplechain

Littler Mendelson P.C., Washington, DC

As a member of Littler's eDiscovery Group, Kimberly counsels and advises Littler's lawyers and their clients on electronic discovery and information governance processes and best practices. Kim works with Littler lawyers across practice groups and nationwide to ensure that electronic discovery is handled in a defensible and cost-effective manner. She routinely advises on issues such as preservation obligations, electronic discovery protocols, protective orders and clawback agreements, strategies for cost-efficient data collection and review, discovery-related motion practice, amendments to the Federal Rules of Civil Procedure. Before joining Littler, Kim worked for federal agency, where she handled employment disputes and litigated several complex ERISA litigation matters before federal district courts and the U.S. Court of Appeals for the District of Columbia Circuit, and advised on eDiscovery matters. Kim also previously served as a Special Assistant United States Attorney in the U.S. Attorney's Office for the District of Columbia, Civil Division, where she litigated numerous cases brought against the United States at the federal district court and appellate level

Phil Favro

Driven, Inc., Alpine, UT

Phil 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). He has led various Sedona drafting teams, including the *Primer on Social Media, Second Edition* (2019) and the *Commentary on Proportionality in Electronic Discovery* (2017) and most recently served as the editor-in-chief for *Commentary on Ephemeral Messaging* (2021) for Working Group 6 (International Electronic Information Management, Discovery and Disclosure).

Claire Hass

Google LLC, Mountain View, CA

Claire is counsel for Google. After joining Google in 2012, she helped shape and grow Google's innovative internal team that performs analytics, review, and privilege analysis for Google's legal department. She continues to contribute to the development of the team's workflows and best practices. Claire provides discovery guidance for various types of litigation matters. She contributes to the analysis of company-wide discovery issues and works to create and implement defensible processes for managing proportional discovery and the reduction of discovery related costs. Prior to joining Google, Claire was in the commercial litigation group at Reed Smith LLP where she focused on discovery analysis and technology, commercial litigation, and product liability litigation. Claire is a graduate of UC Hastings School of Law and a graduate of Pomona College, where she majored in philosophy.

Laura Hunt

Norton Rose Fulbright, Washington, DC

Laura is Counsel with Norton Rose Fulbright in the firm's eDiscovery and Information Governance group. In this role, she formulates creative strategies for the defensible and efficient preservation, identification, collection, review, and production of electronically stored information in response to requests in civil investigations and litigation. Laura also manages the document review and analysis required to ensure clients are in compliance with federal and state laws as a result of a cybersecurity breach. Previously, Laura served as Senior Litigation Counsel for eDiscovery at the United States Department of Justice's Civil Division. Laura is also an Adjunct Professorial Lecturer at American University's Washington College of Law as well as created a practical eDiscovery course for the school's Master of Legal Studies' program. Laura graduated magna cum laude from the University of Baltimore School of Law.

Tessa K. Jacob

Husch Blackwell LLP, Kansas City, MO

Tessa is partner at Husch Blackwell and is the co-founder and co-chair of the firm's eDiscovery Solutions group. A practicing attorney for 28 years, Tessa has a strong understanding of the legal, technical, and strategic aspects of eDiscovery and has served as lead eDiscovery counsel in numerous class actions and has led eDiscovery efforts for numerous companies. She has vast experience with large volume litigation as well tremendous knowledge and experience using data mining tools and technology assisted review. She frequently speaks on issues related to eDiscovery and is on the advisory boards for National eDiscovery Leadership Institute, Arkfeld-ASU eDiscovery Conference, and the University of Florida eDiscovery Conference, and is an Adjunct Professor of Law at the University of Missouri at Kansas City School of Law. Tessa also serves on Husch Blackwell's Executive Recruiting Committee (KC), the Diversity Committee, and Chairs the firm's Diversity and Inclusion subcommittee.

Hon. Kimberly C. Johnson

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

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.

Robert D. Keeling III

Sidley Austin LLP, Washington, DC

Robert is a partner at Sidley Austin LLP whose practice includes a special focus on electronic discovery matters. Robert is the founder and co-chair of Sidley's eDiscovery and Data Analytics Group. He represents companies across a range of industries in civil litigation and government investigations that contain complex eDiscovery issues. Robert is a published author and frequent speaker on topics relating to eDiscovery, information governance, machine learning, and the attorney-client privilege.

Henry J. Kelston

Ahdoot & Wolfson, PC, New York, NY

Henry's practice is concentrated in the areas of class actions, securities litigation and electronic discovery, representing consumers and investors nationwide. He currently represents consumers in class actions involving breast implants allegedly associated with certain cancers, the unlawful use of facial recognition and location tracking by leading technology companies, and improper bank fees charged by major national banks. He also represents limited partners defrauded by the managers of a private investment fund worth nearly \$1 billion as well as consumers in Covid-related refund lawsuits. Henry has been on the front lines in data breach cases against some of the largest technology companies in the world and has represented consumers in class actions challenging food labeling practices, including several cases against major food manufacturers contesting the use of "natural" claims on products containing GMOs. His work in *In re Conagra Foods, Inc.* contributed to a groundbreaking decision by the Ninth Circuit Court of Appeals, significantly strengthening the rights of consumers to bring class actions. Henry is a member of The Sedona Conference Working Group 1 on Electronic Document Retention and Production. Most recently, he assisted in drafting The Sedona Conference Commentary on Legal Holds, The Trigger & The Process and served on the faculty for The Sedona Conference eDiscovery Negotiation Training. He teaches eDiscovery at Legal Services of New Jersey's In-Depth Litigation Skills Training Program and is a frequent speaker on eDiscovery issues.

Jeannine Kenney

Hausfeld, Philadelphia, PA

Jeannine is a partner in Hausfeld's Washington, D.C., office. Jeannine's practice focuses primarily on private enforcement of federal and state antitrust laws. Jeannine's practice also includes mass torts and other non-antitrust matters. Jeannine is adept and experienced in managing all aspects and phases of e-discovery, the

complex process of discovering and producing electronically stored information (ESI). She routinely navigates detailed, complex and contentious ESI issues from dispute to resolution, including briefing and arguing e-discovery motions when necessary. A member of The Sedona Conference Working Group on Electronic Document Retention and Production (WG1), Jeannine counsels Hausfeld's litigation teams in negotiations relating to preservation, search, and production of ESI in cases often involving dozens of defendants, negotiates ESI search terms, technology assisted review (predictive coding) methodologies, and database disclosures and productions, and manages complex document reviews using advanced review analytics to speed discovery. She is band-rated by Chambers and Partners for electronic discovery and information governance, a board member of the Complex Litigation eDiscovery Forum, and a member of the EDRM Advisory Council.

Warren G. Kruse II

Consilio, Delray Beach, FL

Warren is Vice President, cyber investigations at Consilio, a global leader in legal consulting and services. He has spent the last 25 years between law enforcement and as a consultant supporting various agencies with incident response, computer forensics and eDiscovery. Warren is the coauthor of "Computer Forensics: Incident Response Essentials" and is the past International President of the High Tech Crime Investigative Association and the Past President of the Digital Forensics Certification Board. He has supported projects across a wide range of major U.S. corporations and agencies. In addition, he led a team of computer forensic experts in a three-year engagement in support of a fraud investigation task force at the world's largest international cooperative organization. A recipient of the HTCIA "High Tech Case of the Year" award, Warren was recognized for his forensic analysis conducted on a case surrounding allegations of theft of intellectual property and trade secrets on the billion dollar "Comtraid" matter; was a court appointed expert; and testified as a computer forensic expert for the US Securities and Exchange Commission. He is certified CISSP, ENCE, DFCP, CASA, and is a former police officer in New Jersey.

Kelly McNabb

Lieff Cabraser Heimann & Bernstein, LLP, New York, NY

Kelly is a partner in Lieff Cabraser's New York office. As a member of the firm's mass tort and product liability practice group, she has represented people and families who have been injured by dangerous and defective products manufactured by medical device and pharmaceutical companies. Kelly has played an integral role in litigation in state and federal courts across the country and has also represented whistleblowers in qui tam litigation on behalf of the U.S. Government and various states under the federal and state False Claims Acts. Prior to joining Lieff Cabraser, she worked as an attorney in Minneapolis.

Claudia T. Morgan

Wachtell, Lipton, Rosen & Katz, New York, NY

Claudia is eDiscovery Counsel at Wachtell, Lipton, Rosen & Katz, where she focuses her practice on electronic discovery and information management, both domestically and abroad. She has significant experience in responding to and advising on litigation in federal and state courts, regulatory requests for information, and internal investigations, and has managed all aspects of eDiscovery. She counsels clients on a range of information risk management issues, including eDiscovery and Records and Information Management (RIM) best practices and litigation preparation. She received a B.S.F.S. from Georgetown University and completed her J.D., with honors, from George Mason University School of Law.

Angelica M. Ornelas

Bleichmar Fonti & Auld LLP, Oakland, CA

Angelica has substantial experience litigating class actions and other complex matters. At Bleichmar Fonti & Auld, she represents plaintiffs in consumer privacy litigation. Before BFA, Angelica was an attorney at Girard Sharp, specializing in consumer protection and financial products litigation. She served as co-class counsel in *Prather v. Wells Fargo Bank, N.A.*, representing individuals who received illegal automated calls and text messages. Angelica was also a member of the litigation team in *Daccache v. Raymond James Financial, Inc.*, brought on behalf of victims of the Jay Peak investment fraud—the largest in the history of the EB-5 visa program—and *Larson v. John Hancock Life Insurance Company*, a certified class action alleging deduction of improperly inflated cost of insurance charges from customers' life insurance policies. Angelica graduated from Berkeley Law. After law school, she clerked for the U.S. District Court (N.D. Cal.) and the U.S. Bankruptcy Court (D. Nev.).

Niloy Ray

Little Mendelson P.C., Minneapolis, MN

Niloy litigates and counsels on a broad array of preservation, collection, review, production and admissibility issues. A member of Sedona Working Group 1 and EDRM, and faculty member/participant at such conferences as Arizona State University's eDiscovery and Digital Evidence Conference, Georgetown University Law Center's Advanced E-Discovery Institute, Today's General Counsel's "The Exchange" national seminar series and The Masters Conference circuit, Niloy speaks, writes and presents regularly on all topics ESI, from both litigation and information governance perspectives. He relies on his years as a database and software engineer when devising strategies for efficient and effective records management, defensible preservation, data harvesting, culling, and focused review. Niloy has litigated complex tort, antitrust, contract and employment class-action matters, represented energy utilities in regulatory proceedings and related litigation, and conducted internal investigations for Fortune 500 and academic clients. He is a native of India, a graduate of the University of Virginia School of Law, and a proud son of Macalester College, where he teaches

trial advocacy and serves on the Alumni Board. When not staring at a screen and keyboard, Niloy enjoys spinning tales for his wife and children.

Dan L. Regard II

iDiscovery Solutions, Washington, DC

Dan is an electronic discovery and computer science consultant with 25 years' experience in consulting to legal and corporate entities. A programmer and an attorney by training, he has conducted system investigations, created data collections, and managed discovery on over a thousand matters. Dan is responsible for the development and implementation of case and matter strategies that leverage technology in litigation and investigations. He has both national and international experience advising on such issues as electronic discovery, computer forensics, structured data, and information management. Dan is a frequent speaker, teacher, and publisher on issues of electronic discovery. Prior to founding iDiscovery Solutions, Inc. in 2008, he was the national director of e-Discovery for LECCG, the national director of Electronic Evidence & Consulting for FTI Consulting and was an electronic discovery and data analytics team leader in Analytical Dispute Services at Deloitte & Touche, where he managed multi-national, multi-jurisdictional, and multi-counsel litigation support projects. He began his career as the founder of a nationwide litigation-technology company. Dan is a director of the Institute of Computer Forensic Professionals, a longtime associate of the Certified Fraud Examiners, and a board member of Georgetown Advanced Institute for e-Discovery.

Hon. Xavier Rodriguez

U.S. District Court, Western District of Texas, San Antonio, TX

Judge Rodriguez is a former Texas Supreme Court Justice and currently sits on the bench as a United States District Judge for the Western District of Texas. Born in San Antonio, Texas, he received his bachelor's degree from Harvard University, a master's degree from the University of Texas LBJ School of Public Affairs and a Doctor of Jurisprudence degree from the University of Texas Law School. Prior to assuming the bench, he was a partner in the international law firm of Fulbright & Jaworski (now known as Norton Rose Fulbright). Judge Rodriguez is a frequent speaker on continuing legal education seminars and has authored numerous articles regarding employment law, discovery and arbitration issues. He is the editor of *Essentials of E-Discovery* (TexasBarBooks 2d ed. 2021). He is a member of The Sedona Conference Judicial Advisory Board, the Georgetown Advanced E-Discovery Institute Advisory Board, and serves as the Distinguished Visiting Jurist-in-Residence and adjunct professor of law at the St. Mary's University School of Law. He was elected to membership in the American Law Institute and is a Fellow of the American Bar Foundation and the Texas Bar Foundation. In 2011 he was awarded the Rosewood Gavel Award for outstanding judicial service from the St. Mary's University School of Law. In 2017, he received the State Bar of Texas Gene Cavin Award for Excellence in CLE, recognizing his long-term contributions to continuing legal education. In 2021, he was presented the Texas Bar Foundation's Samuel Pessarar Outstanding Jurist Award and TexasBarCle's Pat Nester Innovation in Professional Development Award. He is the Immediate Past Chair of the State Bar of Texas Litigation



**The Sedona Conference Working Group 1 on
Electronic Document Retention and Production**

Annual Meeting 2021

The Ritz-Carlton – Cleveland, OH

October 20-21, 2021

DIALOGUE LEADERS

Section, Past Chair of the State Bar of Texas Labor and Employment Law Section and Past Chair of the State Bar of Texas Continuing Legal Education Committee.

Prof. Karen Sanner

Saint Louis University School of Law, St. Louis, MO

Karen is a Professor at Saint Louis University School of Law in St. Louis, Missouri. Professor Sanner earned her B.S.B.A and her J.D. from the University of Missouri. She started her legal career as an Assistant Attorney General for the State of Missouri, concentrating on administrative litigation, followed by a career in private practice with the law firm of Brinker & Doyen, L.L.P. in St. Louis, practicing civil defense litigation and insurance law. Professor Sanner then joined the faculty of Saint Louis University School of Law in 2010. She teaches legal research and writing, appellate advocacy, trial advocacy, insurance law, and eDiscovery. She is a past member of the Theodore McMillian Chapter of the American Inns of Court and Missouri Organization of Defense Lawyers. She is a current member of the Legal Writing Institute (LWI) and the Missouri Bar Technology and Innovation Committee.

Hon. Brendan J. Sheehan

Cuyahoga County Court of Common Pleas, Cleveland, OH

Judge Sheehan has served on the Cuyahoga Common Pleas Court since January 2008. He was elected to serve as the Administrative and Presiding Judge, effective January 2020. Prior to assuming the bench, Judge Sheehan practiced as a civil and criminal litigator for 14 years. Judge Sheehan earned his B.A. degree at Baldwin Wallace University, his J.D. degree at Cleveland-Marshall College of Law, and his Masters in Judicial Studies at the University of Nevada, Reno.

Hon. Michelle J. Sheehan

Ohio 8th District Court of Appeals, Cleveland, OH

Judge Sheehan has served on the Ohio Eighth District Court of Appeals since January 2, 2019. Prior to being elected to the court of appeals, Judge Sheehan was a shareholder at a large litigation firm. She litigated cases in both state and federal courts for over 25 years. She is one of 25 attorneys throughout the state of Ohio who is a certified appellate specialist by the Ohio State Bar Association. She has represented clients in appellate matters before the Ohio Supreme Court, the Sixth Circuit Court of Appeals, and almost every appellate district in the state of Ohio. Judge Sheehan received her bachelor's degree from Miami University, Oxford, Ohio, and her Juris Doctor degree from Cleveland-Marshall College of Law, where she met her husband, the Honorable Brendan J. Sheehan. She is also a member of the Florida Bar.

Hon. Melody Stewart

Supreme Court of Ohio, Columbus, OH

Justice Stewart was elected in 2018 as the 161st justice to serve on the Supreme Court of Ohio. Prior to joining the Supreme Court, Justice Stewart served on the Ohio Court of Appeals—Eighth District for twelve years and was the court's Administrative Judge in 2013. Before joining the bench, Justice Stewart worked as an assistant law director for the cities of Cleveland and East Cleveland, and subsequently as a member of the faculty and/or administration at the law schools of Cleveland State University, the University of Toledo, and Case Western Reserve University. She also taught at Ursuline College. Justice Stewart earned a Bachelor of Music degree from the College-Conservatory of Music at the University of Cincinnati; her law degree from Cleveland-Marshall College of Law, Cleveland State University; and a Ph.D. from the Mandel School of Applied Social Sciences at Case Western Reserve University. She also has been awarded an Honorary Doctor of Laws degree from Cleveland State University.

Christopher Alan Suarez

Steptoe & Johnson LLP, Washington, DC

Christopher is a high-tech lawyer and trial litigator at Steptoe & Johnson LLP who stays on the cutting edge of technology. His practice includes patent and trade secret litigation, privacy advice and counseling, and numerous other topics at the intersection of emerging technology, intellectual property, and privacy. Chris co-edited and contributed chapters to the ABA's treatise on The Internet of Things: Legal Issues, Policy, and Practical Strategies, including the chapter on "Challenges for Electronic Discovery in the IoT Era," and has spoken on numerous panels regarding the legal implications of the IoT and similar technologies. Chris is a graduate of Yale Law School and a former law clerk to Judge Timothy B. Dyk of the U.S. Court of Appeals for the Federal Circuit. As a co-chair of the ABA SciTech section's membership and diversity committee, he is passionate about improving diversity within the legal profession, particularly in the IP and SciTech fields.

Steven William Teppler

Sterlington, PLLC, Sarasota, FL

Steven leads the cybersecurity and privacy practice at Sterlington, PLLC, and focuses his practice on proactive and preventive security and privacy for clients, as well as class action and mass tort litigation involving personal injury and property damage arising from security vulnerabilities and code defects in technology-enabled devices and services. Steven is an ISACA Certified Data Privacy Solutions Engineer and teaches electronic discovery at Nova Southeastern Shepard Broad School of Law and Ave Maria Law School. He also teaches cybersecurity as a Professor of Practice at the University of South Florida.

Martin T. Tully

Redgrave LLP, Chicago, IL

Martin is partner with the Chicago office of Redgrave LLP. He is a veteran trial lawyer with over 30 years of national experience representing companies and individuals in complex commercial litigation concerning a broad array of fields and industries. Empowered by his commercial litigation practice, he is nationally recognized for his knowledge and experience in the fields of electronic discovery, information governance, and data security/data privacy. Martin advances thought-leadership in data law as the Chair of the Steering Committee of the Sedona Conference Working Group on Electronic Document Retention and Production (WG1), as an active member of the Sedona Conference Working Group on Data Security and Privacy Liability (WG11), the 7th Circuit Council on eDiscovery and Digital Information, the ABA Section of Litigation, Privacy and Data Security Committee, and the International Association of Privacy Professionals (IAPP), as well as a director at-large of the Chicago Chapter of the Association of Certified E-Discovery Professionals (ACEDS). In addition, Martin has published and presented extensively on the topics of eDiscovery, information governance, cybersecurity, data privacy, and legal technology; is among a select group of lawyers in the world ranked for Litigation: E-Discovery & Information Governance by Chambers USA: America's Leading Lawyers and Chambers & Partners Global; and he has been acknowledged by Who's Who Legal as being "steps ahead of his competitors" and "widely regarded for his 'superior knowledge' of electronic discovery and information governance."

Hon. Thomas I. Vanaskie (ret.)

Stevens & Lee, Philadelphia, PA

Judge Vanaskie is a former Judge with the U.S. Court of Appeals for the Third Circuit and Chief Judge of the U.S. District Court for the Middle District of Pennsylvania. He is a member of Stevens & Lee's Litigation Department and chairs the firm's Appellate and Mediation, Neutral Services and Alternative Dispute Resolution practice groups. Judge Vanaskie was appointed to the U.S. Court of Appeals for the Third Circuit in 2010, where he served with distinction for eight years, participating in and deciding many complex, high-profile cases. Before 2010, he served as a district judge for the U.S. District Court for the Middle District of Pennsylvania for 16 years, including seven years as chief judge. He received his Juris Doctor Degree, *cum laude*, from the Dickinson School of Law, after which he served as a law clerk to then Chief Judge William J. Nealon of the Middle District of Pennsylvania, and a B.A., *magna cum laude*, from Lycoming College.

Craig W. Weinlein

The Sedona Conference, Phoenix, AZ

Craig is the Executive Director of The Sedona Conference. He has been a member of the Board of Directors of The Sedona Conference since 2009 and currently serves as the Chairman. Craig has worked with The Sedona Conference since 2000, when he served on the faculty of the first Conference on Patent Litigation. He was a member of The Sedona Conference Advisory Board from 2004 to 2013. Before joining The Sedona Conference

full time in 2014, Craig was a partner with Carrington, Coleman, Sloman & Blumenthal, LLP in Dallas, Texas, for 25 years. He served as Chair of his firm's Intellectual Property Practice Group for his last ten years with the firm. His primary area of practice was complex litigation with a concentration in intellectual property cases. During the course of his career, Craig has tried dozens of cases and argued numerous appeals in federal and state courts. Craig was selected by *American Lawyer Media* and *Martindale-Hubbell* as a 2013 Top-Rated Lawyer in Intellectual Property. He is also listed as one of the best trademark practitioners in Texas in *Who's Who Legal: Texas* for 2007 and 2008 and in the 2012 through 2014 editions of *World Trademark Review 1000—The World's Leading Trademark Professionals*, where he is described as "a remarkable litigator whose wide-ranging trial experience earns him a distinguished market standing." Craig's book, *The Art of Witness Preparation*, is a unique contribution to the literature on complex litigation because it focuses on the witness's testimony and presentation, instead of the lawyer's examination and performance. Craig's publication credits also include articles in *The American Journalism Review*, *The Journal of Arts Management and Law*, and *The American Symphony Orchestra League's Principles of Orchestra Management*.

Jeremy Wikler

Shook, Hardy & Bacon, LLP, Kansas City, MO

Jeremy is of counsel in the Data and Discovery Strategies Practice Group at Shook, Hardy & Bacon L.L.P. He has over a decade of experience managing all aspects of discovery and litigating a wide variety of discovery disputes in multiparty and individual cases pending in state and federal courts across the country. Jeremy regularly advises clients on best practices for discovery and information-governance issues. He is actively involved in the legal community and dedicates a portion of his time to tracking relevant market and technology trends.

Kenneth J. Withers

The Sedona Conference, Phoenix, AZ

Ken is the Deputy Executive Director of The Sedona Conference and its Corporate Secretary. Since 1989, he has published several widely distributed papers on electronic discovery, hosted a popular website on electronic discovery and electronic records management issues, and given presentations at more than 300 conferences and workshops for legal, records management, and industry audiences. His most recent publications are *Ephemeral Data and the Duty to Preserve Discoverable Electronically Stored Information* in the *University of Baltimore Law Review* (2008); *Living Daily with Weekley Homes* in the *Texas State Bar Advocate* (Summer 2010); and *Risk Aversion, Risk Management, and the Overpreservation Problem in Electronic Discovery* in the *South Carolina Law Review* (2013). From 1999 through 2005, he was a Senior Education Attorney at the Federal Judicial Center in Washington D.C., where he developed Internet-based distance learning programs for the federal judiciary concentrating on issues of technology and the administration of justice. Ken also contributed to several well-known FJC publications, including the *Manual for Complex Litigation, Fourth Edition* (2004), *Effective Use of Courtroom Technology* (2001), and the *Civil Litigation Management Manual* (2001).



**The Sedona Conference Working Group 1 on
Electronic Document Retention and Production**

Annual Meeting 2021

The Ritz-Carlton – Cleveland, OH

October 20-21, 2021

DIALOGUE LEADERS

Florence Yee

Prudential Financial, Inc., New York, NY

Florence is Vice President and Corporate Counsel in the Enterprise Litigation Group in Prudential Financial, Inc.'s Law Department, where she manages the Company's global eDiscovery docket in litigation and regulatory matters. She is also lead counsel for the Company's records management program, advising the company on domestic and international records and information governance issues and chairing a working group consisting of attorneys overseeing such issues in other practice groups and disciplines. Florence is an active speaker and participant in various eDiscovery industry professional groups, including serving as co-chair of Electronic Discovery Institute's (EDI) Diversity Committee. She received her J.D. from the Benjamin N. Cardozo School of Law and B.A. from Cornell's University's College of Arts and Sciences.