Mail all correspondence to the Santa Barbara office

■ 5290 Overpass Road, Suite 118, Santa Barbara, CA 93111 • (805) 692-1823

• Fax (805) 692-1827 • E-mail:  info@coastrehabservicesinc.com

May 31, 2022

«First\_Name» «Last\_Name», Esq.

«Firm»

«Address\_1»

«City», «State» «Zip»

**Via Email**: «Fax/Email»

RE: «CaseTitle»

Dear «Title» «Last\_Name»,

In follow-up to your recent contact with this office whereupon you indicated your desire to retain our services, enclosed please find a 5-page Retainer Agreement relative to the above-captioned case.

Please note that we cannot commence services until we receive a signed Retainer Agreement and Retention Check ($5,000 for each assignment) from you. Once we receive both, we will commence services as requested and authorized.

Please put an “X” next to the service(s) you are requesting (i.e., Adult Vocational Evaluation, Life Care Plan, etc.) so there will be no misunderstanding relative to what Specific Services you have requested this office to do.

Also enclosed is a Case Initiation Document requesting pertinent information about your case. Please complete this document in its entirety and return it along with the signed Retainer Agreement and Retention Check.

If we do not hear from you within seven days, we will assume that you have decided not to retain us and may entertain the prospect of retention via other parties if contacted. You do not at this time have our authorization to list us as an expert, but may do so once we have received a signed Retainer Agreement and Retention Check.

Should you have any questions about the provisions set forth in the contract, please feel free to contact our office.

We look forward to working with you.

Sincerely,

Edward L. Bennett, M.A.

Certified Rehabilitation Counselor

Certified Disability Management Specialist

Diplomate, American Board of Vocational Experts

Enclosures: Retainer Agreement

 Case Initiation Document

 Fee Schedule (incorporated within Retainer Agreement)

 Resume

Rev. 5-3-18

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**RETAINER AGREEMENT**

CLIENT : «First\_Name» «Last\_Name», Esq.; «Firm»

CASE TITLE : «CaseTitle»

DATE : May 31, 2022

The undersigned client hereby engages Coast Rehabilitation Services, Inc. (CRS), with respect to the above-referenced case, to provide various Services, which may include any one of the following:

**SERVICES:**

In the course of its work, CRS may render the following services, based upon your choice of Specific Services requested, please see below:

• Review/summary of medical documentation. • Verbal and written communications with physicians and others.

• Review/summary of deposition and interrogatories. • Meetings with physicians and/or write to obtain functional

• Review/summary of work-related documents. limitations and pain factors as well as future care costs.

• Review/summary of earnings-related documents. • Research re future care costs (Life Care Plan).

• Comprehensive evaluation/interview with plaintiff. • Evaluate loss of ability to perform household-related chores.

• Vocational testing, if necessary. • Expert testimony at deposition and/or trial.

• Disability statistical research. • General research, interpretation, etc.

• Expert consultations. • Review of the literature.

• Write various schools attended to obtain educational • Report writing (Life Care Plan, Vocational Evals and Loss of

records Ability to Perform Household Related Chores & Duties Evals)

• Development of questions for opposing experts

**Specific Services Requested (Please mark in the box, to the left, the Specific Services that you are requesting we perform):**

 Adult Vocational Evaluation (Earnings capacity, both pre- and post-insult)

 Pediatric Vocational Evaluation (Earnings capacity at time of majority, both pre- and post-insult)

 Rebuttal - Vocational Evaluation (Evaluating counterpart recommendations and/or opinions)

 Loss of Ability to Perform Household Duties

 Adult Life Care Plan (Cost of Future Medicals)

 Pediatric Life Care Plan (Cost of Future Medicals)

 Rebuttal - Life Care Plan (Evaluating counterpart recommendations and cost factors)

 Wrongful Termination (Post-Employability & Earnings Capacity and Assessment of Duty to Mitigate)

 Analysis of Interactive Process and Reasonable Accommodations (ADA/FEHA)

 Dissolution of marriage to determine residual employability and earnings capacity

 Longshore and Harbor Worker and/or Jones Act case evaluations to determine residual employability and earnings capacity

 Develop list of questions for opposing expert at time of deposition and/or trial

 Other: (please specify)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**TERMS AND CONDITIONS:**

1. **Retainer**: Before services commence, we require a full retainer ($5,000)[[1]](#footnote-1) for each individual assignment, a signed Retainer Agreement, and pertinent documentation, to be submitted to our Santa Barbara office. A $1,500 designation fee is deducted from the $5,000 retainer and is non-refundable should the case settle prior to our intervention.

Retainer Agreement

Case Title: «CaseTitle»

Page 2

1. CRS reserves the right to require an increased retainer and/or continuing retainer for out-of-state cases, and/or when a poor previous payment record has been established.

**The retainer is not intended to cover the full amount of CRS fees but is considered an initial payment which is credited against future billings**. A retainer can be received by the party that signs the contract, or other parties, at the discretion of CRS. Furthermore, at the discretion of CRS, we will bill either monthly, or upon completion of our report, or post-deposition, or post-trial, for charges that are above and beyond the retainer amount. **By signing this document, you agree to pay invoices within 30 days of the date of the invoice**.

1. **Submission of Documents to CRS**: CRS requests that all documents that are available be provided at the time of submission of this Retainer Agreement and Retention Check. Frequently time is of the essence for our clients to obtain our reports, in order to expedite our work and completion of our work, it is very important that you submit all of the noted documents and information as quickly as possible. With regard to submission of records, the preferred medium is electronic/digital documents rather than hard copies, sent as attachments to email or, if they are too large, via compact disk.

**Documents usually required are as follows**: medical reports (both pre- and post-injury); response to form interrogatories by plaintiff and/or defendant; response to special interrogatories by plaintiff and/or defendant pertaining to damages, either vocational and/or medical; deposition of plaintiff and/or defendant and medical treatment specialist; employment-related documents; earnings-related documents; high school and college transcripts; names, telephone numbers and addresses of consulting physicians and/or IME’s; and any other information this office deems necessary.

### Documents and Information to be Provided to CRS:

• Signed Retainer Agreement • Retainer fee (if applicable)

• Case Initiation Document • Employment records

• High School/college records • Hospital records

• Medicals pre- and post-injury (all) • Deposition of Plaintiff

• Depositions of doctors • Copy of Cause of Action

• Interrogatories (form and supplemental) • Information pertaining to future exams

 • Insurance policy (if available) • CCS & Regional Center records, IEP’s and psychological records

• Social services records (if any) (pediatric)

• Designation of experts as retained both for plaintiff • Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 and defense \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

• Income Tax related records or 1099’s or W-2’s \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 (earnings from year prior to accident) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **Hold Harmless:**
2. CRS shall be held harmless at time of submission of report and in the future for client’s failure to submit documents in a timely manner or failure to submit all documents as requested.
3. CRS’s liability shall be limited to the dollar amount of the report/services rendered.
4. **Fees**:

Hourly rate\* $700.00/hour Trial testimony rate Half day $3,600, full day $7,200, plus travel.

Travel time $700.00/hour Expedite fees\*\* Professional hourly fees increased by 20%

Travel mileage $ .58/mile Designation fee $1,500.00 (non-refundable)

Deposition rate $900.00/hour

\* Professional hourly rate is charged regardless of who performed said services within the office of Coast Rehabilitation Services.

\*\*Report and/or opinion needed with less than 30 days' notice.

+ The rate quoted for fees above are the rates at time of retention and if rates change during the time frame that this office is retained to the time that the case concludes you will be responsible for said fees at time of change. Every effort will be made to advise you of rate change should they occur.

**Costs Reimbursable to CRS**:

Photocopies A) $.25/page plus $50.00/hour for CRS copying of file; or

 B) Actual charges plus administrative clerical time at $50.00/hour for copy charges

 outside of office

Faxes $1.00/page

E-mails Receipt and printing of records submitted to CRS via e-mail (5 pages or more), $.25 per page.

Telephone Extraordinary (i.e., conduct initial evaluations over the phone, 3-way conference

 calls; attorney intervention)

Overnight delivery charges Applicable rates for Federal Express, UPS, etc.

Parking fees Applicable rates as charged when attending depositions, meetings with attorneys, court room appearances, etc.

Retainer Agreement

Case Title: «CaseTitle»

Page 3

**Extraordinary costs such as airfare, overnight stay (hotel), taxi fare, bridge fares, parking fees, and large trial charts (for demonstrative evidence), plus any other extraordinary fee, shall be advanced by client prior to actual travel and/or testimony.**

**Interest Charges**: If the invoice is not paid within 30 days of the date of the invoice, you agree to pay interest charges calculated at a rate of 1% per month, which is an annual percentage rate of 12%. In accordance with our firm policies, we may elect to suspend further services if invoices remain unpaid 30 days after the date due, and we may elect not to resume any work until the account is brought up to date. **Responsibility for payment of invoices cannot be transferred to a third party.**

1. **Release of Reports and/or Opinions**: Unless otherwise agreed, you cannot release our report(s) to third parties and/or opinions to third parties until such time that payment is made relative to the overall fees based upon invoices as submitted. Furthermore, this office at its own discretion can refuse to participate in depositions and/or trials until such time as said fees are submitted.
2. **Designate and Hold**: You may wish to designate and hold the office of CRS or Mr. Bennett as your designated vocational expert and/or life care planner, and not have this office provide any services until further permission. The requirement for designation and hold is that you send $1,500, which is non-refundable, and our signed Retainer Agreement to CRS within five business days of your contact with this office. Upon receipt by CRS of the check and Agreement, CRS and/or Mr. Bennett will not make themselves available to other parties in the referenced case. **The $1,500 designation fee is non-refundable**. **Furthermore, if you or your office designates CRS and/or Mr. Bennett without signing said Agreement, the designation within itself will have the same force and effect as if you signed this Agreement and the $1,500 fee will still be due and payable along with the applicable finance fees from date of designation.**

It should be noted that in accordance with **California Code of Civil Procedure §2034.450, an expert must not be designated without his or her prior permission**. Upon designation you are required, per the provisions of this contract, to submit immediately to CRS the designation of Mr. Edward Bennett as your expert.

If you want Mr. Bennett to begin work at any time, simply send the additional $3,500 (the balance of the full retainer of $5,000) along with the pertinent documents.

1. **Expedite Fees:** For opinions required with less than 30 days' notice, normal professional fees will be increased by a factor of 20% (Please see Fees, section 4).
2. **Cancellations**: Plaintiff or Defense Appointments—

**Charges for two hours will be made if scheduled appointments are canceled with less than 24-hour notice.**

1. **Call On Balance Due/Client’s Payment Obligations**:

Verbal or Written Opinions—

* **Payment of all balances incurred to date is required prior to releasing opinions to any party.**

Depositions—

* **Payment of all balances incurred to date including anticipated charges for deposition preparation, pre-deposition meeting, travel time, is required no later than 24 hours prior to deposition**.
* Payment of minimal deposition fee by opposing counsel is required at start of deposition. Failure to pay will result in Mr. Bennett not being deposed.

Trial—

* **Payment of all balances to date including anticipated charges for trial preparation, pre-trial meetings, and travel time no later than 24 hours prior to trial**.

**It is understood that this office does not work on a contingency basis. We expect to be paid whether you win or lose the case.** Fees cannot be contingent upon the outcome or magnitude of the case, or the vocational or life care plan testimony in deposition and/or a trial. Furthermore, **we expect prompt payment, and payment is not contingent upon waiting for settlement of the case or for the trial to commence, etc.**

**CRS reserves the right to stop work, including testimony appearances (depositions, arbitrations, or court­room) when payment has not been received for outstanding invoices which exceed the retainer held by CRS**.

**Responsibility for payment of invoices cannot be transferred to a third party, agent, or another attorney’s firm, and it is the sole responsibility of the firm named as client above, or the attorney signing on behalf of the firm, or the attorney who has signed the contract with this office**. All fees and expenses are the direct obli­ga­tion of your law firm, regardless of the financial condition of your client or prospects of your reimbursement there from. Invoices submitted can be either single referral or consolidated multi-referral, and **each billing statement for the assignment incorporated within the invoice is considered a separate and distinct invoice within itself**, **notwithstanding whether it’s consolidated or single referral.**

Retainer Agreement

Case Title: «CaseTitle»

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**Disputes** **re billing -** The contracting firm as client above, or the attorney signing on behalf of the firm, or the attorney who has signed the contract, **shall have ten (10) days post submission of our report/invoice to raise any issues or con­cerns relative to payment of fees, or this office will assume that you have no issues or concerns relative to the billing.**

**Disputes re deposition fees** - The contracting firm as client above, or the attorney signing on behalf of the firm, or the attorney who has signed the contract, shall be responsible for deposition fees that are not paid by opposing counsel after reasonable attempts as made by this office.

**All checks are to be made payable to Coast Rehabilitation Services, Inc. (Tax I.D. # will provide upon request).**

Check bounce charge **$100.00**.

1. **Records Retention/Storage**: **This office is not to be considered the Custodian of Records other than for records generated by this office** (i.e., vocational reports, life care plans, household duties reports, etc.). **In that regard, we will maintain said files for six years**. With respect to records submitted for review, **said records will either be disposed of post-review, provided to your office at time of deposition, or returned to you prior to deposition**. **Post-deposition, these records will be destroyed or shredded and will not be stored by this office**.
2. **Forum & Venue**: The parties agree that the Superior Court of the State of California shall have exclusive jurisdiction to hear and determine any claims or disputes between the parties arising out of or related to this Agreement.  The parties expressly submit and consent in advance to such jurisdiction in any action or suit commenced in such court, and each party waives any objection that it may have based on personal jurisdiction, improper venue or *forum non conveniens*.
3. **Governing Law**: This Agreement shall be governed, construed, and enforced in accordance with the laws of the State of California without regard to conflict of law rules.
4. **Location Where Contract To Be Performed**: Coast Rehabilitation Services will carry out and perform all work needed to satisfy its obligations under the terms of this Agreement at and through its Santa Barbara, California office.  As such, all correspondence and submission of documents and records, is to be directed to its Santa Barbara, California office.
5. **Additional Terms**:
	1. It is specifically understood that this Agreement is between Coast Rehabilitation Services, Inc., and the firm named as client above, or by the attorney signing on behalf of the firm, or the attorney who has signed the contract, and not between Coast Rehabilitation Services, Inc., and the above-named plaintiff, defendant, or insurance carrier. CRS has no contractual relationship with such plaintiff, defendant, or insurance carrier, and such plaintiff, defendant, or insurance carrier is not a third-party beneficiary of these terms.
	2. **It is agreed that this contract, either single referral or multi-referral consolidated contact, will be considered a separate contract for each service requested for purposes of enforceability, and retainer monies will be required for each separate assignment**.
	3. **This Agreement may be terminated with or without cause upon written notice by either party to the other**. Such termination shall not, however, affect the right of CRS to collect fees for services performed or costs incurred prior to termination.
	4. Please promptly review all reports as generated. **If you feel something has not been covered, you are required to notify this office immediately so we can follow up re same**.
	5. Conclusion of Case: The contracting firms as client above, or the attorney signing on behalf of the firm, or the attorney who has signed the contract, is obligated/required per the provisions of this contract to inform CRS via letter form, accepted as either regular mail, fax, or e-mail, that the case has either settled and/or concluded prior to trial, and that we are to stop work. **If this office does not receive written correspondence relative to the aforementioned, and continues to provide services, said client is responsible for payment of all fees for services rendered, up through and past the conclusion of the case**.

f. CRS may recommend another expert, and CRS shall not be responsible for the actions of such expert and shall not be considered to be an agent of such expert. You will indemnify, defend, and hold harmless CRS from and against any claims, loss, costs, damages, and expenses (including reasonable counsel fees) arising from or relating to your failure to investigate and confirm the expert’s qualifications.

g. Entire Understanding: This agreement constitutes our full and complete understanding with you, superseding any and all previous statements, agreements, and understandings, written or oral, with respect to the subject matter of this agreement. The terms of this agreement may be supplemented or amended only in writing, signed by you and CRS, which would then be

Retainer Agreement

Case Title: «CaseTitle»

Page 5

 considered an addendum to this agreement. This agreement will be governed and construed in accordance with the laws of the State of California.

h. In the event that legal action arises pertaining to this Retainer Agreement, and CRS needs to hire an attorney or incur expenses to collect fees and costs due CRS, whether or not mediation, arbitration or a lawsuit is commenced, in addition to any other relief to which CRS is entitled, all of the attorneys’ fees and other litigation expenses incurred by CRS in pursuing the collection of such fees and costs/expenses shall be paid by the client to CRS.

i. In terms of enforceability, the firm named as client above, or the attorney signing on behalf of the firm, or the attorney who has signed the contract, agrees that a copy of this form (either a photocopy or a fax copy) has the full force and effect of the original.

j. Due to all of the numerous variables, CRS cannot guarantee the outcome of your case.

If you have any questions relative to the provisions of this agreement or need interpretation of same, please telephone our office immediately.

If this 5-page Retainer Agreement accurately sets forth the terms of our Agreement with you in the above-described proceeding, please acknowledge your approval by signing below.

Upon receipt of this 5-page signed Retainer Agreement (original or copy thereof) and Retention Fee, Coast Rehabilitation Services, Inc., is retained to provide a Vocational Evaluation, Life Care Plan, evaluation of Loss of Ability to Perform Household-Related Chores & Duties, and/or any other services requested by the contracting party. You then have authorization to use Mr. Bennett’s name and designate him as your expert with regard to Vocational Evaluation, Life Care Plan, evaluation of Loss of Ability to Perform Household-Related Chores & Duties, and/or other services as you have requested.

Entered into in Santa Barbara, California, on the date written below.

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ COAST REHABILITATION SERVICES, INC.

 By\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Edward L. Bennett, M.A.; CRC.; CDMS; D-ABVE; CLCP

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ «Firm»

 By\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 «First\_Name» «Last\_Name», Esq.

Enclosure: Fee Schedule

 Form Rev. 5/31/22

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**CASE INITIATION DOCUMENT– PERSONAL INJURY**

COMPLETE CASE TITLE/CAPTION : «CaseTitle»

COURT CASE # & VENUE : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

REPORT(S) NEEDED BY : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Will you accept Electronic Report : Yes No

Do you want Hard Copy Report : Yes No

MSC DATE : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TRIAL/MEDIATION DATE : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

We are assisting (check one) : Plaintiff Defendant

FIRST CHAIR ATTORNEY : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TELEPHONE & CELL : Telephone\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

EMAIL : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ATTORNEY’S ASSISTANTS INFO : Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Telephone\_\_\_\_\_\_\_\_\_\_\_\_\_ Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

SECOND CHAIR ATTORNEY : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TELEPHONE & CELL : Telephone\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

EMAIL : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ATTORNEY’S ASSISTANTS INFO : Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Telephone\_\_\_\_\_\_\_\_\_\_\_\_\_ Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PLAINTIFF’S INFORMATION:**

NAME : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ADDRESS : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DATE OF BIRTH : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

SEX : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

RACE : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DATE OF INJURY : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

May we contact plaintiff (check yes or no)? Yes No Telephone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### CARRIER INFORMATION (for defense cases):

COMPANY : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ADDRESS : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CITY/STATE/ZIP : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

NAME OF ADJUSTER : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CLAIM NUMBER : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TELEPHONE & FAX : Telephone\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Fax\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Case Initiation Document – Personal Injury

Case Title: «CaseTitle»

Page 2

### OPPOSING COUNSEL:

ATTORNEY : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

FIRM : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ADDRESS : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CITY/STATE/ZIP : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TELEPHONE & FAX : Telephone\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Fax\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### YOUR ECONOMIST

NAME : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

FIRM : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ADDRESS : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CITY/STATE/ZIP : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TELEPHONE & FAX : Telephone\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Fax\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### YOUR MEDICAL EXPERT(S)

NAME/EXPERTISE : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

GROUP : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ADDRESS : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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 Form revised 6-18-14

Mail all correspondence to the Santa Barbara office

■ 5290 Overpass Road, Suite 118, Santa Barbara, CA 93111 • (805) 692-1823

• Fax (805) 692-1827 • E-mail:  info@coastrehabservicesinc.com

**FEE SCHEDULE FOR LITIGATED CASE WORK**

## PROFESSIONAL FEES

PROFESSIONAL TIME $700.00 PER HOUR

RUSH WORK-UP $840.00 PER HOUR

TRAVEL TIME $700.00 PER HOUR + $.58 PER MILE

WAITING TIME $700.00 PER HOUR

DEPOSITION TESTIMONY TIME $900.00 PER HOUR (2-HOUR MINIMUM)\*

TRIAL AND/OR ARBITRATION TESTIMONY FEES HALF DAY $3,600, FULL DAY $7,200 PLUS TRAVEL

DESIGNATION $1,500.00\*\*

CHANGES/CANCELLATIONS WITHOUT 24-HOUR NOTICE:

 For appointments……………………………………….$700.00 per hour (2-hour charge)\*\*\*

 For deposition/testimony……………………………….$900.00 per hour (2-hour charge)\*\*\*

**OTHER FEES**

CLERICAL $50.00 PER HOUR

PHOTOCOPIES $.25 PER PAGE

**DEPOSITION FEES (2-HOUR MINIMUM) ARE DUE AND PAYABLE**

**BEFORE THE DEPOSITION DATE**

PROFESSIONAL TIME is time spent by the counselor conducting interviews, reviewing records, performing general casework, research, investigation, and/or writing reports.

TRAVEL TIME is time spent traveling to and from interviews of plaintiffs or defendants, interviews of employers, meetings with attorneys, meetings with doctors or other professionals, conducting job analyses, etc.

WAITING TIME is time spent waiting to visit physicians, attorneys, employers, plaintiff/defendant, or other professionals.

TESTIMONY TIME is time spent testifying at pretrial hearings, administrative law hearings, courtroom testimony, depositions, and/or arbitration hearings.

Telephone charges and extraordinary expenses are charged according to expense incurred while working on each case.

\* If the deposition runs over 2 hours, we will submit an invoice to the responsible party. As per the Code of Civil Procedure, Section 2034, paragraph 2, we expect the invoice to be paid in full within 5 days.

\*\* If services commence, the designation fee will be credited towards the account.

\*\*\* Changes/cancellations without 24-hour notice will be charged according to the amount of time allotted for the appointment.

Rev. 5/31/22

EDWARD L. BENNETT

Coast Rehabilitation Services, Inc.

5290 Overpass Road, Suite 118

Santa Barbara, CA 93111

(805) 692-1823

# OBJECTIVE

To provide vocational rehabilitation services and vocational rehabilitation evaluations

within various systems.

# EMPLOYMENT

## Coast Rehabilitation Services, Inc. --- June 1977 to Present

Offices in **Los Angeles, California,** and **Santa Barbara, California**.

Proprietor/Vocational Rehabilitation Counselor for firm providing the following services in Southern-Central-Northern California:

• Forensic Vocational Evaluations, Life Care Plans, and Household Duties Analysis for: vaccine cases, personal injury, medical malpractice, wrongful termination, wrongful death, marital dissolution/spousal support, maritime, longshore and harbor workers, railroad, pediatric, elder abuse, TBI/head injuries, sexual abuse/molestation/rape, sexual discrimination, or wherever pre- versus post-injury earnings capacity is at issue.

• Development of Life Care Plans for disabled individuals, in areas of TBI/head injury, spinal cord injuries, vaccine cases, amputations, LTD, birth/pediatrics, organ injuries, burns, etc.

• Labor Market Surveys to determine post incident vocational potential and earnings capacities

• Develop list of questions for experts in regards to evaluations for household duties, loss of earnings, and future medical expenses.

• Assist employers in determining reasonable accommodations under FEHA and/or ADA.

• Provide services in regards to the interactive process under FEHA and/or ADA.

• Case Manager assisting the disabled community.

• Trust advocacy/guardianship for severely disabled pediatric cases.

• Evaluations for Workers’ Compensation vocational rehabilitation, long-term disability, and longshore and harbor worker cases.

• Social Security representation.

• Vocational and personal counseling.

• Vocational rehabilitation plans for selective job placement, on-the-job training, and academic training.

• In-depth labor market research.

• Consultations for Americans with Disabilities Act.

• Consultant, County of Santa Barbara GAIN program.

• Consultant, U.S. Dept. of Labor.

• Consultant, disability retirement plans.

• Consultant, Social Security Administration, Office of Hearings & Appeals.

• Consultant to U.S. Dept. of Justice, Division of National Vaccine Act, Court of Federal Claims

• Consultant, State Teachers Retirement System

• Consultant, Teachers Insurance and Annuity

• Consultant, Railroad Retirement Board

• Consultant, Metropolitan Stevedore

• Consultant, long-term disability carriers.

• Consultant for States of California, Washington, Florida, Alaska and Hawaii.

• Disability advocate to aid and assist the disabled community in obtaining rightful benefits.

• Assessment of physical aspects of jobs (job analysis).

• Vocational testing, work tolerance evaluation, and job-seeking skills instruction.

### International Rehabilitation Associates, Inc. --- January 1977 to March 1978

 Performed the work of a vocational counselor, providing services to individuals under California Workers’ Compensation and Long Term Disability systems.

# EDUCATION

Monroe Community College, Rochester, New York

 A.S. Degree, Liberal Arts and History, 1972

University of Northern Colorado, Greeley, Colorado

 B.S. Degree, Vocational Rehabilitation, 1975

 M.A. Degree, Vocational Rehabilitation, 1976

University of Florida, Winterpark, Florida

 Post-graduate certificate: Life Care Planning for Advanced Catastrophic

 Case Management, 4/95

--Completed 160 clock hours, taught by various medical professionals within their field

Continuing Education/CEU (Detailed on pages 6-18)

6/10/78 – 1/21/22, 1,038 CEU's within the fields of Vocational Rehabilitation, Life Care Planning, Americans with Disabilities Act, Medicare Set-Aside, Worker's Compensation, Social Security, Longshore & Harbor Workers Labor Laws, case management, discrimination cases, etc.

# INTERNSHIPS

• 1974, Wayne County Vocational Services, psychometric testing.

• 1976, Dept. of Rehabilitation; vocational rehabilitation counselor intern serving generalized case load.

• 1976, Rehabilitation Institute of Santa Barbara (aka Memorial Rehabilitation); dual capacity, vocational rehabilitation counselor intern and psychological counselor intern serving catastrophically disabled under Chief Clinical Psychologist, Ronald Hartley, Ph.D.

# CLINICAL EXPERIENCE

• 1976, Rehabilitation Institute of Santa Barbara (aka Memorial Rehabilitation; aka Cottage Hospital Rehabilitation). Participated in patient bedside rounds with orthopedists, PM&R's, internists, and psychologists, with subsequent participation in Care Plan development for each patient.

# CERTIFICATIONS

**Insurance Rehabilitation Institute**, Certificate, 1977

Participate in class instruction, obtain a certificate in providing insurance rehabilitation to disabilitants under various systems (i.e., LTD, WC).

**Certified Rehabilitation Counselor (CRC)**, Commission on Rehab. Counseling Cert., #11674, 1978

Persons who are designated as Certified Rehabilitation Counselors (CRC) must demonstrate that they are of good moral character, meet acceptable standards of quality of their practice and have requisite educational professional background. To become certified, must meet stringent eligibility requirements including: advanced education, work experience, and must achieve passing score on CRC examination.

Requires: (1) testing for specialized knowledge through national certification exam; (2) education and degree from accredited program; and (3) experiential background, to qualify for same.

Additional requirements are continuing education for certification renewal to ensure skills and knowledge are kept current.

Requires formal professional code of conduct, or ethics model for accountability and compliance with ethical compliances.

**Vocational Expert**, Soc. Sec. Admin., Office of Disability Adjudication and Review, Dept. of Health & Human Services, 1978

Requires educational and experiential background and interview with administrative law judge, requires vocational expert to provide opinions based upon hypothetical questions in regards to limitations as proposed by the judge to determine eligibility for acceptance of disability under the program.

Under contractual agreements to appear before ALJ and provide testimony regarding employability of claimant in accordance with code of federal regulations governing the Social Security Disability and Supplemental Security Income programs.

**Certified Disability Management Specialist**, Commission of Rehabilitation Counseling Certification, #00462, 1984

CDMS is the only nationally accredited and independent organization that certifies Disability Management Specialists, and confirms that one has specialized knowledge to analyze, prevent and mitigate the human and economic impact of disability for employers and employees, has demonstrated the professional experience, knowledge and educational background to competently deliver disability management services, is committed to continuing education and upgraded skill, and adheres to the highest professional ethics, including the code of professional conduct developed by CDMS.

Requires: (1) testing for specialized knowledge through national certification exam; (2) education and degree from accredited program; and (3) experiential background, to qualify for same.

Additional requirements are continuing education for certification renewal to ensure skills and knowledge are kept current.

Requires formal professional code of conduct, or ethics model for accountability and compliance with ethical compliances.

**Certified Vocational Rehabilitation Counselor**, U.S. Dept. of Labor, Division of Federal Government, OWCP #13-31, 3/85

Provide vocational rehab case management service to federal employees injured on the job.

**Diplomate, American Board of Vocational Experts**, #292-85, 1985

ABVE is a professional credentialing body established as a non-profit organization.

Certification requires: (1) Master or Doctorate Degree from an accredited institution in human services field specializing in vocational rehab, psychology, or vocational counseling; (2) Have specific training experience such as assessment, functional capacity measures, psychological testing, measurement job analysis, job placement, job surveys, and have experience providing testimony in these areas; (3) Displays knowledge and experience within submitted forensic work product; and (4) score on the ABVE exam.

Diplomate status requires 7 years of documented experience in the area of assessment of vocational capacity and vocational expert opinion and/or demonstrations of distinguished performance or recognition as vocational expert.

Ongoing continuing education is required to maintain certification.

**Vocational Expert**, U.S. Railroad Retirement Board, 6/86

### Out-of-State Provider, Rehabilitation Counselor Certification

 State of Washington, Dept. of Labor, #7645, 2/89

 State of Florida, Dept. of Labor, #XA003536, 6/90

 State of Alaska, Dept. of Labor, #26619, 4/23/92

 State of Colorado, Dept. of Labor & Employment, #1640, 9/590

 State of Nebraska, Workers’ Compensation Court, VRC Cert. #PC-0320

 State of Nebraska, WC Court, Job Placement Specialist Cert. #PJ-0303

**Independent Vocational Evaluator**, State of California, Dept. of Industrial Relations, 6/90

Qualified for and continues to participate in a list of qualified rehabilitation representatives who meet the requirements of independent vocational evaluator (IVE) pursuant to labor code section 4635(c) utilized when a dispute arises regarding assignment of qualified rehab reps under the California Workers Compensation system.

**Cert. Life Care Planning Expert**, Cert. For Life Care Planning for Advanced Catastrophic Care Mgmt, 1995

This program is offered through the University of Florida, and required participation in 160 clock hours of education taught by various professionals within their fields (i.e., orthopedists, neurologists, psychiatrists, psychologists, etc.). Topics addressed in the extensive curriculum include professional orientation to life care planning, spinal cord injury, adult and pediatric brain injury, adult and pediatric amputations, multiple physical and psychological disabilities, standards, case management, ethics, and expert testimony. Post completion of the program one is required to sit for a comprehensive examination.

**Cert. Life Care Planner (Cert. #0028)**, Commission on Disability Examination Certification, 4/16/96

Educational requirements: at least a Bachelor's Degree from an accredited institution; Rehabilitation Certificate such as CRC.

Experience: minimal of 3-5 years of experience.

Sit for the CLCP exam which requires a minimum of 120 hours of post graduate or post specialty degree training in life care planning, within the 120 hours there must be 16 hours training specifically in basic orientation, methodology, standards of practice, and life care planning.

Other requirements: graduation from an accredited training program which includes practicum internship which requires development of independent life care plan for review and critique by faculty member.

Requires a passing score in CLCP certification examination.

Ongoing continuing education is required to maintain certification.

**Fellow**, International Academy of Life Care Planners, 11/11/02

International Academy of Life Care Planners is a special interests section of the International Association of Rehabilitation Professionals, a non-profit organization, whose mission is to become preeminent associates for shaping the evaluation of life care planning.

**Certification, State of California Dept. of Industrial Relations**: Vocational Return-To-Work Counselor (VRTWC), 8/20/14.

*Education, Preparation & Certification:* A **Life Care Planner** must possess appropriate educational requirements as defined by the professional standards. A **Rehabilitation Counselor** should possess the requisite Master' Degree and sufficient education and training to ensure understanding of human anatomy, physiology, pathophysiology, health care delivery systems, role and functions of various health care professionals; and promote high standards of professional performance and ethics.

•National Association of Rehabilitation Professionals in the Private Sector -- NARPPS

# PROFESSIONAL GROUPS

•Consumer Attorneys Association of Los Angeles (aka California Trial Lawyers Association)

•Los Angeles County Bar Association

•Pacific Disability & Business Technical Assistance Center (ADA Panel)

•International Academy of Life Care Planners

•Employment Law Network (LinkedIn.com)

•Employment Law Corporate Connection (LinkedIn.com)

•National Employment Lawyers Assn.

# AWARDS

1975, received Rehabilitation Services traineeship grant awarded by U.S. Government to pursue Master's Degree in the field of Vocational Rehabilitation Counseling.

# TESTIMONY AS VOCATIONAL EXPERT

•Superior Court (750+ times)

•U.S. Federal District Court (60+ times)

•Arbitrations (70+ times)

•Deposition testimony (950+ times)

•Administrative law hearings regarding Social Security (1,800+ times)

•Informal/formal conferences/California workers’ compensation (100 + times)

•WCAB hearings (50+ times)

•Longshore and harbor workers ALJ hearings (50+ times)

•Disability retirement ALJ hearings (10 times)

•Teacher removal, ALJ hearings (fit for duty) (5 times)

•Railroad retirement, ALJ hearings (20 times)

# CASE LOAD (NUMBER AND TYPES OF CASES SERVED)

•Vocational rehabilitation cases, ongoing from initial interview to case follow-up (6,500+).

•Forensic cases, both plaintiff and defense referrals (approx. 1,750).

# GEOGRAPHIC AREAS OF REFERRALS

• California, from Southern California (San Diego) through Northern California (Sacramento area), although predominantly Los Angeles, San Diego, and Santa Barbara.

• Out of state: Hawaii, Maine, Massachusetts, Missouri, Nebraska, Nevada, Oregon, Tennessee, Texas.

• International: Scotland, England, Australia, Marianna Islands, Canada.

References available upon request

Revised: 1/21/22

6/10/78 – 1/21/22, 1,038 CEU's as follows:

# CONTINUING EDUCATION

Training as a Vocational Expert, Social Security Administration, Louis Zinn (10 CEU's) 6/10/78

Understanding & Motivation Employees, UCSB Extension (6 CEU’s) 7/21/80

Improving Supervisorial Skills, UCSB Extension (6 CEU’s) 8/11/80

Center for Continuing Education, Minneapolis, Minnesota (8 CEU’s) 9/15/83

• Expert Vocational Testimony

OWCP Certification Workshop (16 CEU’s) 2/5/85 – 2/6/85

• Overview of Federal Employee Compensation

• Overview of Longshore Compensation

• OWCP Perspectives on Rehabilitation Process

• Forms Management

• Written Plans & Reports

• Appropriate Costs; Proper Invoicing

Office of Hearings & Appeals training (15 CEU’s) 3/1/87 – 3/3/87

• Overview of Forensic Vocational Evaluations in the U.S.

• Transferability of Skills Analysis Under Social Security Criteria

• Review of Medical Impairment of Listings

• Labor Market Surveys Under OHA Guidelines

• The Role of the Rehabilitation Expert in OHA Hearings

• Holding Up to Cross-Examination

• Mock OHA Hearings

• Response to Interrogatories

OWCP Certification Workshop (16 CEU’s) 1987

• Vocational Rehabilitation Process

• OWCP Rehabilitation Forms

• OWCP Rehabilitation Reports

• OWCP Rehabilitation Bills/Billing

• OWCP Contract Requirements

• OWCP Program Requirements

Update on Labor Law, UCSB Extension (6 CEU’s) 1989

Drugs in the Work Place, UCSB Extension (3 CEU’s) 1989

ABVE Annual Conference (14 CEU’s) 3/6/89 – 3/8/89

• Pain Assessment, Treatment and Litigation

• A Multidimensional Model of Behavior on Vocational Evaluation

• Mock Trial, Vocational Case

• Life Care Plan & Loss of Earnings Capacity for the Vocational Expert

• Challenges of Managing an Independent Practice

• Wechsler & Wide Range Test Results in Association w/Field Level Occupational Theory

Health Hazards in the Work Place, UCSB Extension (6 CEU’s) 1/9/90

1990 NARPPS National Conference (13 CEU’s) 2/28/90 – 3/4/90

• Case Management: The Next Generation

• Establishing Vocational Impairment

ABVE Conference (14 CEU’s) 3/25/90 – 3/28/90

• Malpractice Issues and Life Care Planning

• Treatment for Low Back Patients

• Head Injuries & Vocational Expert Issues

• The Vocational Expert in a Social Security Hearing Setting

• Physical Capacities Education, Work Hardening & Its Use by Vocational Experts

SCRE/RNS Conference ( 13 contact hours) 7/26/90 – 7/28/90

• Early Intervention, Working Together • Maturation & Mobilization

• Latest Treatment Methods: Back Injuries • Resources Fair

• Complex Joint Injuries: Knees & Shoulders • Perspectives on Legislative Changes

• Hand & Wrist Injuries in the 1990’s

1990 CARP Convention: Rehab & All That Jazz (10 CEU’s) 9/13/90 – 9/15/90

• New Opportunities for Rehab Technology; Dragon Dictate/Speech Recognition Computer Program

• An Inspiration for Rehabilitation/Melendez

• OWCP FECA Workshop

• How to Prevent/Minimize Internal Business Disputes

• Vocational Economic Model for Evaluation of Loss of Earnings Capacity

• Keynote: Richard Bolles

• Medical & Psychological Aspects of Chronic Pain Among Hispanic Injured Workers/Factors That Affect Rehabilitation Outcome

• Specialized Services for Workers with Upper Extremity Injuries

• Engineering Technology: A Problem-Solving Method for Selecting Appropriate Adaptive Technology Including Manual Wheelchairs

• Stress& Psychological Factors of Law Enforcement Personnel

• How a VRC Can Be Used by Accountants & Economists for Spousal Support Cases

ABVE Annual Conference (12 CEU’s) 3/25/91 – 3/27/91

• Voc. Eval.: Implications for a Vocational Expert

• ADA Impact on Vocational Experts

Vocational Rehabilitation Counselor Training, U.S. Dept. of Labor (16 contact hours) 4/4/91

• Vocational Rehabilitation Process

• Reports/Reporting by Rehab. Counselors

• Forms Management

SCRE/RNS Conference (7 CEU’s) 7/13/91 – 7/14/91

• Minor Head Injury Through Return to Work • How Rehab Legislation Affects You & Your Job

• Functional Assessments--Testing & Evaluations • SCRE/RNS Conference Exhibitors

St. Jude Center for Rehabilitation, Lectures for Rehab. Professionals (2 contact hours) 7/24/91

• Value of Diagnostic Imaging in the Brain Injured

CARP 1991 Conference (10 CEU’s) 1991

• Legislative Panel: WC Reform 1991

• Implications of Americans w/Disability Act

• New Perspective on Job Placement Resources

• Continuous Trauma Disorders (CTD’s) - CTS

• Musculoskeletal Rehab. & Orthopedic Exams: What Does the Physician’s Report Really Mean?

• Conference Exhibitors

• Commitment to Excellence

• Flexible Work Options for the Disabled

• Hiring/Firing/Promoting Personnel Evaluation

St. Jude Centers for Rehabilitation, A Seminar on Spinal Cord Injury Treatment & Case Management 9/26/91

(7 contact hours)

Rehabilitation Institute, in affiliation with Santa Barbara Chamber of Commerce (7 contact hours) 10/11/91

• Barrier Free: Designing for Accessibility

OWCP Certification Workshops (15 CEU’s) 10/24/91 – 11/05/91

ABVE Conference (14 CEU’s) 3/23/92 – 3/25/92

• Starting & Managing a Forensic Practice

• The Issue of Pain in Evaluation & Court Testimony

• Client Evaluation Systems & Techniques

• Hand Injury Workshop Clinic

• Head Injury Workshop Clinic

ADA Seminar presented by Pacific Disability in Business Technical Assistance Center 5/11/92 – 5/12/92

(16 contact hours)

• Vocational Rehabilitation Process

• Forms Management

• Reports & Reporting by Rehabilitation Counselor

• Bills & Billings by Rehabilitation Counselors

• OWCP Contract Requirements

• OWCP Program Requirements

ADA General Session seminar (14 CEU’s) 9/25/92 – 9/26/92

• Head Trauma Assessment

• Treatment & Testimony in Head Trauma Cases

ABVE Conference (14 CEU’s) 3/8/93 – 3/10/93

• Economic Perspective re Use of Vocational Experts & Their Resources

• Role of Vocational Expert & Resources Utilized

• Preparing Vocational Expert for Courtroom Testimony

NARPPS 1993 National Conference, “Private Rehabilitation: Evolving Into The 21st Century” 4/22/93 – 4/24/93

(14 contact hours)

• The New Wave of Marketing

• Corporate America Responds to Needs & Rights of the Disabled

• Legislative Impact on Private Rehabilitation

• Prosthetics

• Vocational Evaluation: A Progressive Approach to Assessing Cognitive Abilities

• The Future for the Vocational Witness

• Mock Trial

• Life Care Planning

Vocational Rehabilitation Counselor Training, U.S. Dept. of Labor (16 contact hours) 8/31/93

• Vocational Rehabilitation Process

• OWCP Rehabilitation Forms

• OWCP Rehabilitation Reports

The Rehabilitation Training Institute & University of Florida, **Life Care Planning for**

**Catastrophic Case Management** (160 total contact hours) 1/93 – 5/26/95

Track One Track Two

PRINCIPLES & METHODOLOGY VOCATIONAL ASSESSMENT

• Life Care Planning • Intro. To Assessment of Rehab Potential

• Step-by-Step Procedures • Validity/Reliability: Decision Styles

• Tenets & Methodologies • Intro. To Vocational Evaluation

• Resources • Aptitude Tests

• Articles on Case Management • Combined assessments

• Marketing • Personality Tests

• Interview Formats • Neuropsychological Evaluation

• Medical Records – Physician Contact • ERGOS Evaluation System

• Working with the Physician • Earnings Capacity Analysis

• Spinal Cord Injuries • Labor Market Surveys

• Equipment Renovations • Job Analysis

• Head Injury • Transferable Skills vs. Worker Traits

• C.P. Multi-Case Examples • Sample Case Analysis

• Other Injuries: Case Examples • Ethics

• PVS (Persistent Vegetative State)

• Amputations

• Vocational/Wage Loss Issues

• Legal Matters – Rehab Testimony

Track Three Track Four

• Consultation Services vs. Expert Services ADVANCED CASE MANAGEMENT

• Medical Records Analysis • Intro. To Forensic Rehab. Applications

• Medical Research • Terms, Definitions: Lawyer’s Viewpoint

• Experts • Roles & Rules of Experts

• Deposition: Review & Summarization • Terms, Definitions: Rehab Consultant’s Viewpoint

• Case Management • Mock Trial

• Attendance at Medical Examination

• Demonstrative Evidence as Litigation Technique

• Life Care Plan/Life Care Plan Review

• Vocational Issues

• Outcome-Driven Case Management

• Collateral Source

• Special Needs Trust

Track Five Track Six

HEAD & SPINAL CORD INJURIES BRAIN DAMAGE – PEDIATRICS

• TBI: Overview, Definitions, Management • Medical Aspects, Birth thru Developmental Years

• Acute Care: Early Intervention, Benchmark for Outcomes • Long-Term Care Issues

• Mechanism of TBI • Life Expectancy

• Biofeedback & Behavioral Aspects • Complications

• Neuropharmacology • Seating & Positioning: Wheelchair Systems

• Psychiatric vs. TBI • Intake/Evaluation

• Spinal Cord Injuries: Intro. & Overview • Long-Term Care Planning – Rehab Needs

• Transition to Home/Work; LCP Issues • Respiratory Care – Home Ventilatory Care

• Managing Long-Term Care & Support • Augmentative Communication/Assistive

• Aging with Spinal Cord Injury Technology

• Life Expectancy in Spinal Cord Injury • Collateral Source Review

• Long-Term Care Issues – Linking Spinal • Rehab Testimony: Presentation of the Brain

 Cord Injury to Special Recommendations Damaged Infant Case in Deposition &

• Vendor Presentation/Equipment Review Trial Setting

• Long-Term Care Issues

Track Seven Track Eight

MULTIPLE DISABILITIES PROFESSIONAL & OPERATIONAL

• Upper Extremity Impairments (Revasculari- ISSUES

 zation; Replantation; Microvascular Surgery • Principles of Establishing LCP & Case

• Carpal Tunnel Syndrome Management Practice

• Life Care Planning: Implications • Organizing, Conferencing, Meetings,

• Multiple Disabilities (Multiple Orthopedic Injuries: Patient Consultations, Depositions & Trials

 Back Injuries; Pain Control; Amputations; Burns) • Computer Applications

• Abuse Issues in the Work Place for the • Insurance

 Rehab Professional • Ethics

• Amputations – Prosthetics Overview

• Life Care Plan Implications – Amputation

• Life Care Planning (Chronic Pain Management;

 Psychological Implications; Misc. incl. Chronic

 Fatigue Immune Deficiency Syndrome & Multiple Sclerosis

Rehabilitation Training Institute, Life Care Planning Refresher Course (6 CEU’s) 3/16/96

• LCP Checklist & Step-by-Step Procedures • Amputation

• Checklist for Comprehensive Medical Records • Burns

 and Analysis • Chronic Pain/Low Back Injury

• Medical-Legal Consulting Checklist • Pulmonary Issues

• Medical Terms/Abbreviations • ADA

• Spinal Cord Injury • Vocational Issues

• Brain Injury

Vocational Rehabilitation Counselor Training, U.S. Dept. of Labor (16 CEU’s) 3/22/96 – 3/24/96

• OWCP Standards, Regulations & Guidelines • OWCP Rehabilitation Reports

• Vocational Rehabilitation Process • OWCP Ethics

• OWCP Rehabilitation Forms

California Brain Injury Foundation seminar, “Defining Economic Damages in Brain Injury Cases” 11/8/96

• Appropriate Use of Neuropsychologist • Direct Exam of Voc. Expert

• Neuropsychological Assessment: What to Look For • Direct Exam of Economic Expert

• Direct Examination of a Neuropsychologist • Use of Life Care Planner in

• Vocational Economic Assessment Brain Injury Case

• Vocational Assessment • Evaluating LCP in Brain Injury Cases

• Economic Assessment • Direct Exam of LCP Expert

Vocational Rehabilitation Conference Sponsored by California State Teachers Retirement System 1/9/97 – 1/10/97

(16 CEU’s)

• General Information • Billing/Services Guidelines

• Case Management Guidelines • Rehabilitation Law

• Plan Development • Forms

Consumer Attorneys Association of Los Angeles, “Employment Discrimination Cases” (2 CEU’s) 5/97

• Psychologists as Experts in Employment • Plaintiff’s Deposition in Employment

 Discrimination Cases Discrimination Cases (Plaintiff’s Perspective)

• Employment Discrimination Cases – Economic • Plaintiff’s Deposition in Employment

 Damages Discrimination Cases (Defense Perspective)

• Use of Employment Practices Experts in

 Employment Discrimination Cases

Consumer Attorneys Association of Los Angeles, “Experts, Part II; Trial” (2 CEU’s) 9/97

• The Adjudication of Meaning; Scientific and • Defense Perspective

 Expert Opinion Testimony • Rebuttal Witnesses

• Plaintiff’s Presentation of Expert • Cross-Examination of Defense Expert Longshore Institute, Inc., “Comprehensive Examination of Longshore Act” 1/28/98 – 1/29/98

• Procedures & Forms • Discrimination

 Injury & Presumptions • Jurisdiction

• Medical Treatment • Notice of Statute Requirements

• Controversion • Wages, Average Weekly Wages & Compensation

• Rehabilitation • Penalties

• Attorneys Fees • Third-Part Claims

• Disability • Special Fund

• Settlements • Death Claims

• Litigation • Occupational Disease

Fourth Annual Life Care Planning Conference, University of Florida (24 CEU’s) 11/4/99 – 11/6/99

• Life Care Planning for Catastrophic Cases • Avoiding Legal Quicksand (Legal Issues)

• How to Produce a Day-in-the-Life Settlement Video • Cognitive Dysfunction & Remediation

• Trust: What Life Care Planners Need to Know Approaches for Individuals w/Dementia

• Role of the Economist in Life Care Planning • Cutting Edge Approaches to Managing

• State of the Union for Life Care Planners Pain & Associated Costs

• PVS: Diagnosis, Prognosis & Cost Ramifications • New Studies in Spinal Cord Injuries

• Considerations in Development of LCP’s for the • Daubert: How It Impacts the Expert

 Neonate Witness – Research Outcomes

• Disease State Management—Rheumatic Disease, • Patient Compliance

 Fibromyalgia & Arthritis

NARPPS, November/December 1999 1/00

• Vocational Consultant as an Expert In Divorce Litigation (2 hours)

American Board of Vocational Experts, Fall Conference, Vancouver, B.C. (13 CEU’s) 10/5/00 – 10/8/00

• Mild Head Injury Controversy; Implications • Minority Issues in Vocational Rehabilitation

 for Practice & Court Testimony • PTSD & Vocational Rehabilitation

• Seizure Disorder: Neurology/Vocational Aspects • Work Motivation

• Psychological Approach to TS Analysis • Depression & Anxiety Disorders: Implications

• Returning Chronic Pain Patients to Work for Vocational Rehabilitation

• Carpal Tunnel Disorder & Functional Capacity • Psychological Impairment & Occupational

 Disruption Disability

Vocational Rehabilitation Counselor Training, U.S. Dept. of Labor (8 CEU’s) 11/14/00

• OWCP Standards, Regulations & Guidelines • OWCP Rehabilitation Reports

• Vocational Rehabilitation Process • OWCP Longshore Cases

• OWCP Rehabilitation Forms

International Association of Rehabilitation Professionals, November/December 2000 12/00

• The Potential For Clinical Bias In Vocational Expert Testimony (2 hours)

American Board of Vocational Experts, Spring 2001 Conference, San Diego, CA (10.25 CEU’s) 3/24/01 - 3/25/01

• Effective Expert Witnessing-Basic & Advanced Strategies • Courtroom Testimony

• Testing Brain Power & Behaviors For Work Capacity • The Quality of Expert Testimony

• Translate Testing into Vocational Functional Ability • Gamboa’s Work Life Expectancy Tables

• Employment Law: The Vocational Experts Role • Interfacing with the Economists

International Association of Rehabilitation Professionals, October/November/December 2003 10/01

• Status of Women Professionals in Rehabilitation Education (1 hour)

Intelicus/University of Florida, “Advanced Pain Management” (16 CEU’s) 10/17-18/02

• Nelson Handler, M.D.: Pain Diagnostics/Medication Options/Treatment Options

• Medtronics: Spinal Cord Stimulator Implant & Intrathecal Infusion Device

• New Treatment for Back Pain: Nucleoplasty

• David Hanks, Ph.D., Pain Psychologist/Psych. Assessment & Treatment: Functional Capacity Evaluation

• Life Care Planning Issues/General Discussion

7th Annual Life Care Planning Conference, Intelicus/University of Florida (16 CEU’s) 10/19-20/02

• Keynote: Improving the Outcome of Brain Trauma Patients by Jamshid Jhajar, M.D., Ph.D.

• Living with Consequences of Brain Injury: Implications for LCP, by Alan Bergman, Pres./CEO, Brain Injury Assn., Inc.

• The Latest in Spinal Cord Injury Research by Barth Green, M.D., Prof./Chairman of Dept. of Neurological Surgery, Prof. of Ortho. & Rehab., Univ. of Miami School of Medicine; Chief Neurosurgical Services at Jackson Memorial Hospital and Miami Veterans Affairs Medical Centers.

• The Importance of Voc. Rehab. & LCP by Timothy Field, Ph.D., Former Prof. & Coordinator of Rehab. Counseling Training Program, Member of Graduate Facility, University of Georgia; President of Elliott & Fitzpatrick, Inc.

• Cost Methodology: Streamlining Your LCP by Rebecca Busch.

• Cross-Cultural Issues of Life Care Planners by Michael Hale.

• The Rights of Expert Witnesses: Brushes with Ethical Violations by Mark Rabinoff, Ed.D., Professor of Human Performance Sports & Leisure Studies at Metropolitan State Univ. Denver.

• Sexuality Issues for the LCP by Lisa Hannold.

• Hepatitis C: A Case Study by Patricia McCollom and Paula Sundance, M.D.

• Catastrophic Injuries: Functional Outcomes & Inappropriate Physician Recommendations by Terry Winkler, PM&R Physician, C.L.C.P., PM&R Private Practice, Springfield, Missouri; Medical Director of Cox Rehab. Hospital rehabilitation programs and Springfield Park Care Subacute Rehab Program and Curative Rehab. Center; and Robert H. Meier, PM&R Physician, Dir. of Houston Center for Amputee Services & Senior Attending Physician for Texas Regional Spinal Cord Injury Services, Chairman/Rehab. Medicine at Univ. Colorado Health Svc. Ctr. Former Director of Amputee Ctr. of America; moderator Paul M. Deutsch, Ph.D., C.R.C., C.C.M., C.L.C.P.

• Family-Centered Pediatric Life Care Planning by Priscilla P. Phillips, R.N., C.C.M., C.L.C.P., Program Coordinator, Medical-Legal Services; and Nancy J. Bond, M.Ed., C.C.M., C.L.C.P., Associate Director of The Coordination Center.

International Association of Rehabilitation Professionals, October/November/December 2002 11/02

• Rehabilitation Internet Sources (1 hour)

• Psychiatric Rehabilitation in America: A Work In Progress (2 hours)

American Board of Vocational Experts, Spring 2003 Conference, San Diego, CA (14.75 CEU’s) 3/21/03 - 3/23/03

• Testifying Opportunities in WC Litigation—The Road Ahead, by Susan Silberman & Leonard Silberman, Esq.

• Medical Disability Evaluations; Help or Hindrance for Testifying Expert, by Alex Ambroze, M.D., M.Ph.

• Reliability of Life Care Planning, by Penelope Caragonne, Ph.D.

• Railroad Litigation; What’s Unique About the Arena for Voc Experts, by Robt. Meyers, Esq.

• Ethics & the Expert, by Hank Lagerman, ABVE Past President, and Katherine Martin-Miller, Ph.D.

• Practice Mgmt. Techniques in Marital Dissolution by Susan Stevenson

• Practice Mgmt. Techniques & Business Opportunities with V.A., by Eloy Castillo

• Defining an Effective Expert Witness, by Carey Steigwalt, Esq.

• Anatomy of Civil Trial & Role of Expert Witnesses, by Andrew Schwartz, Esq.

• Job Analysis Methods for Forensic Testimony, by Roger A. Thrush, Ph.D.

International Association of Rehabilitation Professionals, April/May/June 2003 04/03

• Animal Assisted Therapy and the Child with Severe Disabilities: A Case Study (1 hour)

American Board of Vocational Experts, Spring 2004 Conference, Charleston, NC (17 CEU’s) 3/19/04 - 3/21/04

• Vocational Economics: Point-Counterpoint

• Sexual Harassment: Challenges in the Modern Work Place

• Quantifying Psychological Injury in Employment Law, Medical Malpractice, and Other Cases

• Vocational Testimony: How to Prepare and Handle Cross-Examination

• Vocational Assessment Issues with Children & Adolescents

• Blood Poisoning in Pediatric Cases

• Vocational Correlates of Neuropsychological Assessment

• Railroad Litigation: What’s Unique About This Area for Vocational Experts

• New Techniques of Law

• ABVE-Ethics & Issues

International Association of Rehabilitation Professionals, April/May/June 2004 7/04

• Rehabilitation Counselor Burnout: Causes, Symptoms and Remedies (1 hour)

Pacific ADA & IT Center (Pacific Disability and Business Technical Assistance Center), American’s With Disabilities Act (ADA) Update Training, San Francisco, CA (8 hours) 5/20/04

• Changes and court decisions regarding Titles II and II of the ADA by John Wodatch, Chief, Disabilities Rights Section, Department of Justice

• Updated information on Title I (the employment provisions of the ADA) by Adele Rapport, Federal Regional Attorney EEOC

International Association of Rehabilitation Professionals, July/August/September 2003 4/04

• Ethical Objectivity in Forensic Rehabilitation (1 hour)

American Board of Vocational Experts 2004 Fall Conference, Las Vegas, NV 10/1/04 – 10/3/04

• Round Table Discussion: Standards of Practice in California Family Law; by Marlis Bruns, Susan Stevenson, Peter Eliaser, Betty Kohlamberg, Robert Cottle & Rachel Hawk. (1.5 hours)

• Riding the Swinging Pendulum in California Worker's Compensation; by Susan Silberman, J.D., and Leonard Silberman, J.D. (1.5 hours)

• Can Your Test Results Be Challenged Because Base Rates Were Not Considered?; by Dr. Roskenranz, Ph.D. (1.5 hours)

• Considering the Whole Person: The Development & Role of Vocational Factors in the Social Security Administration Disability Program; keynote speaker Sylvia Karman, Sr. Policy Analyst for SSA. (1 hour)

• Unionization of VE's in Front of Social Security; by Kenneth Manges, Ph.D. (.5 hour)

• Inter-Organizational O'Net Task Force; by Sylvia Karman & Joseph Cannelongo. (1.5 hours)

• Functional Capacity Evaluation: Validity & Reliability Considerations; by Gary Amick, P.T., and Jim Strady, P.T. (1.5 hours)

• Legal-Political Update (re Social Security Programs & Regulations Impact on Vocational Experts; panel presentation (1 hour)

• Disfigurement & Its Effect on Employability; by Kenneth Manges, Ph.D. (1.5 hours)

• Mock Trial; moderator Ira Spector. (2 hours)

• Collaborative Divorce & the Value of Non-Wage Activity in the Household; by Ellen Gamberg, Ph.D. (1.5 hours)

• PTSD Post-9/11; by Ellen Gamberg, Ph.D. (1 hour)

• Job Analysis Formats & Measurements; by Allen Nogourney. (1 hour)

International Association of Rehabilitation Professionals, November/December 2004 1/05

• Obesity: Addressing A Multifactorial Disease (1 hour)

Medicare Set-Aside Program, University of Florida, Atlanta, GA (16 hours) 1/22/05 - 1/23/05

• Keynote: Michael Pierson, MSP Atlanta Regional Coordinator of The Centers for Medicare and Medicaid Services

• Medicare Set-Aside Allocations: Understanding the Basics; by Janice Gould, RN, CLCP of Gould & Lamb

--Medicare Overview

--Medicaid, SSD, SSI

--Shifting the Burden to Medicare: Past, Present and Future

--CMS Threshold for Review

--The Medicare Set-Aside (MSA) Arrangement Overview

--Past Medicare Payments

--The Emergence of the Professional MSA Allocator

--Multidisciplinary MSA Team

--Process Flow Chart

--Sample Cases

• Medicare as the Secondary Payer; by Beverly Manley, Esq. of the Law Offices of Beverly Manley & Assoc., P.C.

--Regulatory Framework

--Enforcement Provisions

--Case Law

--Class Action

• CMS Policy Memorandums: Highlights; by Wade C. McGuffey, Jr, Esq. of Goodman, McGuffey, Lindsey & Johnson, LLP

• Medicare Conditional Payments; by Beverly Manley, Esq., Law Offices of Beverly Manley & Associates, P.C.

• The Role of the Attorney Specializing in Medicare Set-Aside Allocations; by Lisa Schrage, Esq. of the Law Offices of Lisa Schrage, LLC

• Medicare Basics; by Ramone Kimmins, CNLCP, CRRN, CCM

--Determining what is Medicare Allowable

• MSA Allocation Report; by Ramone Kimmins, CRRN, CNLCP, CCM

• Relationship Between Life Care Planning & MSA's; by Earlene Stanislaw, CLCP, CCM, DABFN, LNCC

• The Role of the Structured Settlement Broker; by Bill Matthews of Ringler Associates, Inc.

• The Role of the Professional Administrator; by Robert Barson of Medivest, Inc.

• Medicare/MSA’s and Medicaid Special Needs Trusts; by David Paul Pollan, Esq. of The Pollan Law Firm

• Medicare Prescription Drug, Improvement and Modernization Act of 2003; by Thomas M. Finn, Esq. of Finn & Hurtt Attorneys at Law

Medicare Set-Aside Program, University of Florida, San Francisco, CA (16 hours) 2/24/05 - 2/25/05

• Introduction to program, by Thomas Bosserman, CMS, Health Insurance Specialist

• Keynote address, by Jeff Flick, Regional Administrator, CMS-SFO

• Medicare As a Secondary Payer, by Thomas Bosserman

• Coordination of Benefits (COB) Contractor, by Sherri McQueen, COBC

• Workers’ Compensation Medicare Set-Aside Arrangements, by Donna Kettish, CMS CO, Technical Advisor

• Workers’ Compensation Review Contractor, by Olivia Williams, CMS CO

• Workers’ compensation Data Exchange, by Neil Hoosier, COBC and CMS CO

• Medicare & Workers Compensation Recovery Issues, by Thomas Bosserman, Claudia DeCea/Greg Kost, UGS, Medicare Contractor

• CMS Panel Discussion with Q&A

• MSA and State Workers’ Compensation System, by Merle Ravine, Chairman WC Appeals Board; David Hettick, Esq., ALJ, SFO; Melissa Brown, Esq. Claimant Attorney; and Laura Bruyneel, Esq., Defense Attorney

• The Role of the Private Sector in MSA’s, by Robert T. Lewis, Esq.

--From the WC Client’s Perspective by Lisa Schrage, Esq.

--From the WC Carrier’s Perspective, by Sharif Cheatham, Esq.

--The Role of the Allocator-Understanding the Basics, by Nancy LaGasse

--The Role of the Life Care Planner as an Allocator, by Nancy LaGasse

--Settling Liability Claims with MSA’s, by Jan Gould

--Applying the Knowledge, by Jan Gould

• Panel Discussion with Q&A

International Association of Rehabilitation Professionals, July/August/September 2004 2/05

• Pattern of Rehab. Services to Consumers of Diverse Ethnicity: One Stat’s Five-Year Perspective (1 hour)

• Best Practices in Cases of Gifted Individuals Who Sustain Acquired Brain Injuries (1 hour)

International Association of Rehabilitation Professionals, January/February/March 2006 5/06

• The Need for a Formal Training Program to Prepare Vocational Experts (1 hour)

• Public Vocational Rehabilitation Outcomes (1 hour)

International Association of Rehabilitation Professionals, April/May/June 2006 7/06

• The MMPI-2 and Other Personality Measures in Forensic Vocational Assessment (1 hour)

International Association of Rehabilitation Professionals, July/August/September 2006 8/06

• Worklife and Disability: Confronting the Myths (1 hour)

• Preventing Falls with a Multi-Disciplinary Approach: A Collaborative Effort Between Occupational Therapy, Nursing, and Neuro-Optometric Rehabilitation (1 hour)

International Association of Rehabilitation Professionals 2006 Forensic Conference, Scottsdale, AZ 11/3-4/06

• Expert Testimony in the CSI World, The Honorable Lynn S. Muller, RN, BS, JD, CCM, JMC (1.5 hours)

• Maintaining Objectivity in Loss-of-Earnings Capacity and Life Care Planning, Donald E. Woodall, MS, CRC, LPC, Bruce Brawner, MA, CRC, LCP, David Stewart, MA, CRC, LCP, CLCP (1.5 hours)

• Loss of Household Services: Quantifying the Loss, Kenneth Reagles, PhD (1.5 hours)

• A Framework for ADA Evidence, Lewis E. Vierling, MS, NCC, NCCC, CRC, CCM (1.5 hours)

• Advisory Opinions Issued by the CRCC Ethics Committee Affecting Private Sector and Forensic Practice, Mary Barros-Bailey, MA, CRC, CDMS, CLCP, NCC, ABVE-D, Ann Neulicht, PhD, CLCP, CRC, CVE, CDMS, ABVE-D, LPC (1.5 hours)

• Supporting the Expert’s Opinion: Research Relative to Employment Law Cases, Angela M. Heitzman, MA, CRC, CLCP, MSCC; Carl Gann, Med, CRC, CDMS, ABVE-D (1.5 hours)

• Which Tests Really Measure Up? A Resource Guide for Vocational Experts, Judith Drew, PhD (1.5 hours)

• Loss of Competitive Advantage: The Ignored Element of Damage, Kenneth Reagles, PhD (1.5 hours)

International Association of Rehabilitation Professionals, October/November/December 2006 11/06

• Working Alliance and Workers’ Compensation: Implications of the Working Alliance Model for Rehabilitation Counselors in the Workers’ Compensation System (1 hour)

• The Earning Capacity Assessment Form: An Exploratory Factor Analysis (1 hour)

• Counseling and Forensic Issues in Identification and Intervention in Factitious Disorders, Munchausen’s Syndrome and Malingering (1 hour)

American Board of Vocational Experts 3/29/07 – 4/1/07

• 3/30/07, How to Take the Fear Out of Cross-Examination by Michael Graham (4.5 hours)

• 3/30/07, Legal Restrictions on Employment; Solutions for Unique Workers by Sok-Khieng Lin, Esq., and Betty Kholenberg (2.25 hours)

• 3/30/07, Advanced Testimony Skills: Successful Expert Witness Testimony by Paul Luvera, Esq. (2.25)

• 3/30/07, Translating Neuropsychological Test Results into Prediction of Employability by Roger Meinz, Ph.D. (2.25 hours)

• 3/31/07, A View from the Bench: The Future of Expert Witnesses by Judge Michael J. Trickey, Kings County Superior Court (1.5 hours)

• 3/31/07, Interactive Report Writing for Different Forensic Venues by Carl Gann, Esq. (Employment Law), Marlis Bruns, Esq. (Family Law), and Larry Sinsabaugh, Esq. (Personal Injury) (2.25 hours)

• Interactive Round Table with Speakers & Participants; Monitors Carl Gann, Esq., Marlis Bruns, Esq., and Larry Sinsabaugh, Esq. (1.5 hours)

• 3/31/07, How to Access a Mine Data Sources for Forensic Decision by Jane Fields and Judith Parker. (2.25 hours)

• 3/31/07, The Necessary Interface Between Economic & Vocational Experts by Eugene Silverberg, Ph.D. (1.5 hours)

• 3/31/07, New Emerging Practice Guidelines for Forensic Life Care Planners by Julie Kitchen (2.25 hours)

International Association of Rehabilitation Professionals, January/February/March 2007 7/07

• Obesity and Hypertension in Individuals Aging with Brain Injury (1 hour)

• Knowledge and Attitudes Towards Consumers with HIV/AIDS (1 hour)

International Association of Rehabilitation Professionals, April/May/June 2007 7/07

• Are Ethics at Risk for Vocational Experts? (1 hour)

• Liability Insurance Issues for Rehabilitation Services Professional in Provision of Powered Mobility Devices to Clients? (1 hour)

International Association of Rehabilitation Professionals, July/August/September 2007 7/07

• Predicting Program Completion Outcomes of Consumers of State Operated Comprehensive Rehabilitation Centers (1 hour)

• Predictors of 9/11 Disability Insurance Claim Duration for People with Post Traumatic Stress Disorder (1 hour)

International Association of Rehabilitation Professionals 2007 Forensic Conference, Las Vegas, NV 11/2-3/07

• Music Within, Richard Pimental (Heighten awareness of experience of people with disability) (1.5 hours)

• The Alphabet Soup of Credentialing, Anthony J. Choppa, Med; Timothy F. Field, PhD; and Robert Weed, PhD (1.5 hours)

• Long Term Planning for Individuals with Visual Impairments, Carolyn Wiles Higdon, PhD (1.5 hours)

• Labor Market Search: Utilization of Labor Market Research and Employer Sampling by Vocational Experts, John F. Berg, Med,; Carl Gann, Med; Ann T. Neulicht, PhD; and Robert H. Taylor, MA (1.5 hours)

• Enhancing the Voc and LCP Expert’s Effectiveness in Litigation—Working with the Forensic Economist, Barry Ben-Zion, PhD, Professor Emeritus and Consulting Forensic Economist (1.5 hours)

• Professional and Expert Testimony: Ethics and Communication Issues, Gordon J. Blush, EdD (1.5 hours)

• Know when to Hold ‘Em: A Roundtable Discussion (relative to practicing forensic rehabilitation, ethical issues (1.5 hours)

• Safeguarding Confidentially: Best Practices for Electronic Communication and Data Storage, Mary Barros-Bailey, PhD and Robert Barros-Bailey, MPA (1.5 hours)

International Association of Rehabilitation Professionals, Volume 15 Number 4, 2007 11/07

• Labor Market Search: Utilization of Labor Market Research and Employer Sampling by Vocational Experts (1 hour)

• Applications of Work Physiology Science to Capacity Test Prediction of Full-Time Work – Eight Hour Work Day (1 hour)

International Association of Rehabilitation Professionals 2008 Forensic Conference, Los Angeles, CA 5/08

• Comparing disability outcomes using empirical data on earnings loss for disabled workers compensation claimants (Rand published study evaluating permanent disability ratings in CA), Robert T. Reville, PhD, Director of Institute for Civil Justice (1.5 hours)

• Improving Outcomes through Effective Collaboration with Neuro-Optometry, Eric T. Ikeda, OD, FCOVD, Neuro Optometric Rehabilitation Association, International, Inc. (2.0 hours)

• Employment Numbers: An Industry Evolution (accuracy and methodology behind popular employment number statistics), Jeffrey Truthan, MS, CVE, President, SkiiTRAN LLC (2.0 hours)

• Rehabilitation Counseling: Focus on the Future, Amy Armstrong, PhD, CRC, Assistant Professor, VA Commonwealth U, et al. (1.5 hours)

International Association of Rehabilitation Professionals, Volume 16 Number 2, 2008 7/08

• The Earning Capacity Assessment Form: A Study of Its Reliability (1 hour)

• The International Classification of Functioning Model & Untreated Psychological Need in Workers' Compensation (1 hour)

International Association of Rehabilitation Professionals, Volume 17 Number 2, 2009 5/09

• A Call to Update the DOT: Findings of the IARP Occupational Database Committee (2 hours)

• Military-related PTSD: The epidemiology, Symptoms, and Treatment Considerations (2 hours)

International Association of Rehabilitation Professionals, Volume 17 Number 4, 2009 1/10

• Video Recordings in Forensic Examinations (2 hours)

• Content Analysis of Factors Identified in Vocational Evaluation Analysis Reports (2 hours)

International Association of Rehabilitation Professionals, Volume 18 Number 1, 2010 3/10

• The Impact of Case Law Vocational Expert Examinations and Opinions in Marital Dissolution (2 hours)

International Association of Rehabilitation Professionals, Volume 18 Number 3, 2010 10/10

• The People Have Spoken: Perceived Barriers in North Carolina WC Case Management (2 hours)

• Updated Values of Household Services from the American Time Use Survey: Values by Gender, Age and Employment Status (2 hours)

International Association of Rehabilitation Professionals, Volume 18 Number 4, 2010 5/11

• Adjustment Disorder: Considerations for the Workers’ Compensation System (2 hours)

International Association of Rehabilitation Professionals, Volume 19 Number 1, 2011 5/11

• Proposed Application of Delphi Method for Expert Consensus Building within Forensic Rehab Research:

 A Literature Review (2 hours)

• Future Work Propensity: A Proposed Alternative to Purely Statistical Models of Work-Life Expectancy (2 hours)

CDMS (Certified Disability Management Specialists) Webinar, "Evolving Work Force: Older

Workers' Impact on the Disability Management Process." (2 hours) 7/26/12

Upper Extremity Impairment Considerations in Life Care Planning, Life Participant Webinar by

International Assn. of Rehabilitation Professionals (Confirmation #9738110). (2 hours) 8/14/12

Complementary and Alternative Medicine in Rehabilitation: Body-Oriented and Mind/Body Therapies

by Continuing Education for Certified Health Professionals (22 hours) 8/13/13

Post-traumatic Stress Disorder (PTSD): The Basics, Treatment Modalities and Family Issues by

Continuing Education for Certified Health Professionals (14 hours) 8/13/13

Conflict of Interest - Its Pervasive Impact on Ethical Decision-Making by Continuing Education for

Certified Health Professionals (8 hours) 8/15/13

Americans with Disabilities Act: Overview, Legal Cases and Political Updates by Continuing

Education For Certified Health Professionals (16 hours) 8/19/13

Privacy Fundamentals, Medical Privacy & HIPAA by Continuing Education for Certified Health

Professionals (18 hours) 8/28/13

Alternative Medicine in Rehabilitation Part 1: Body Based Therapies (22 credits, self-study) 10/1/14

Alternative Medicine in Rehabilitation Part 2: Energy-Based Therapies (18 credits, self-study) 10/1/14

Ethical Dilemmas and Considerations (6 credits), self-study 10/18/15

Conflict of Interest: Ethical Dilemmas (8 credits, self-study) 10/18/15

PTSD Part 1: Assessment and Treatment (16 credits, self-study) 10/24/16

Burns: Assessment, Rehab and Lifelong Healing (10 credits, self-study) 10/25/16

Aging and Spinal Cord Injury (12 credits, self-study) 10/26/17

Opioid Abuse: Diagnosis, Culture and Treatment (10 credits, self-study) 10/26/18

Vocational Rehabilitation Technical Assistance Center for Quality Employment National Needs, via

University of Wisconsin,-Madison School of Education 1/20/21

Americans with Disabilities Act: Protecting and Accommodating Special Populations - Part 1

(6 credits, self-study) 12/31/2021

Americans with Disabilities Act: Introduction, History, and Overview (4 credits, self-study) 12/31/2021

Neuroanatomy and Assessment - Part 2: The Adult Neurologic Assessment and Neurodiagnostic/

Laboratory Studies (10 credits, self-study) 12/31/2021

Blast Injuries Part 1: Overview and Treatment (10 credits, self-study) 12/31/2021

 Clinical Practice Guidelines for the Management of Concussion - Mild Traumatic Brain Injury

v. 2.0 (12 credits, self-study) 12/31/2021

# ACTIVITIES

**PRESENTATIONS:**

Vocational Evaluations & Life Care Plans in Personal Injury Cases

•American Board of Trial Advocates, 5/31/83

Nuts & Bolts Aspects of Forensic Vocational Evaluations

•Santa Barbara Bar Assn., Litigation Division, 8/31/89

Defense Forensic Vocational Evaluations & Life Care Plans

•Paper presented in-house, Law Firm of Lawler, Bonham & Walsh, 5/3/90

Defense and Plaintiff Forensic Vocational Evaluations & Life Care Plans

•Paper presented in-house, Law Firm of Mullen, McCaughey & Henzell, 5/16/90

Defense Forensic Evaluations & Life Care Plans

•Law Firm of Archbald & Spray, 1990

Defense Forensic Evaluation

•Law Firm of Nordman, Cormony, Hair & Compton, 1991

Defense Forensic Evaluation

•Law Firm of Henderson & Wolgamuth, 1991

Forensic Vocational Evaluations & Life Care Planning

•St. Paul Fire & Marine, 1993

Provisions of American with Disabilities Act

•In-house presentation, Kinko’s Corporation, Phoenix 1994

Plaintiff and Defense Vocational Evaluations & Life Care Plans

•Santa Barbara Legal Assistants Association, 1994

Plaintiff Vocational Evaluations & Life Care Plans

•Santa Barbara Bar Association, 1994

Life Care Planning, Las Vegas

•Consumer Attorneys, California Trial Lawyers Association, 1995

Panel Presentation: Plaintiff vs. Defendant Vocational evaluation & Life Care Planning

•Ventura Bar Association, 1995

American Law Institute--American Bar Assn., Committee on Continuing Professional Education, 6th Annual Advanced, ALI-ABA Course of Study for Plaintiff & Defense Bars, Current Developments in Employment Law, 7/15/99 – 7/17/99, Santa Fe, New Mexico

*Topics--*

•Vocational Rehabilitation Experts in ADA and Other Employment Cases (Mitigation; Substantial Limitations; Loss of Future Earnings; When to Use Such an Expert; Special Problems in Preparation for Direct/Cross Examination)

Mock Trial/Panel Discussion: Cross-Examination of Vocational Expert

•Ventura County Trial Lawyers Assn., 7/27/99

In-House Presentation on Plaintiff & Defense Vocational Evaluations, Life Care Planning, and Household Duties Analysis for Litigation Purposes

•Woosley & Associates, Santa Barbara, 1/18

**PUBLICATIONS:**

American Disabilities Act Alliance Newsletter, Center on Education & Work, University of Stout

•Kinko’s Way Ahead on ADA; chapter on Life Care Planning, 4/93

Dental Malpractice. Author: Safler; Publisher: Wylie & Sons, Inc.

•Chapter on Life Care Planning, 4/26/96 Revised: 1/21/22

1. Retainer checks can be submitted by your office, by the plaintiff and/or defendant, or any other party. Regardless of who submits the retainer monies, the individual or firm who signs this contract is responsible for payment of fees above and beyond retention monies. [↑](#footnote-ref-1)