



JAYNE'S PRACTICE MANAGEMENT & BILLING CONSULTING SERVICES LLC

EXPERT SERVICES | RIGHTS & RESPONSIBILITIES

Independent opinions • Defensible methodology • Clear litigation terms

01 CLIENT / RETAINING COUNSEL RIGHTS

◇ OBJECTIVE ANALYSIS

Independent conclusions grounded in records and methods.

▣ SCOPE & FEES

Written scope, rates, retainers, minimums and expenses.

◆ COMMUNICATION

Clear milestones, material limitations and status updates.

⚖️ EXPERT INTEGRITY

Disclosure of relevant conflicts and qualifications.

02 RETAINING COUNSEL RESPONSIBILITIES

COMPLETE RECORDS

Supply authentic, relevant records and case assumptions.

DEADLINES & ACCESS

Identify deadlines, venues, scheduling and witness needs.

SECURE DISCLOSURE

Use approved channels for PHI and confidential material.

PAYMENT & COORDINATION

Pay agreed fees; manage legal filings and discovery.

03 EXPERT-SPECIFIC BOUNDARIES

The consultant's opinions remain independent and may not favor a retaining party. No outcome, admissibility, judicial acceptance, settlement value, or testimony result is guaranteed. Counsel controls litigation strategy and legal advice. Opinions may change when new evidence is supplied. Compensation is not contingent on findings or case outcome.

04 CONFIDENTIALITY, PRIVILEGE & TESTIMONY

Materials will be handled under the signed engagement and applicable law. Privilege and work-product treatment depend on jurisdiction, retention role, and case facts; no blanket privilege is promised. Counsel is responsible for identifying protective orders and disclosure obligations. PHI handling requires appropriate safeguards and agreements where applicable.

05 DISPUTES, ENGAGEMENT & ACKNOWLEDGMENT

Report concerns promptly to the engagement contact. The signed expert engagement letter controls fees, cancellations, deposition/trial minimums, expenses, termination, record retention and dispute resolution. This document is an acknowledgment, not a substitute for that agreement.

Firm / matter reference: _____

Retaining counsel name / signature / date: _____

Consultant representative / signature / date: _____