

Litigation Support

More often lately I am retained for litigation support purposes. While I am not an attorney, what I am clearly seeing in the market is that litigators and their clients often have reasonable cases but they have little ability to understand the nuances of the market, best practices, reasonable expectations, and how the market works in general. My role is to bring them up to speed regarding the issues at hand, offer my opinion on what is reasonable and what is not, perform research, provide technical resources, discover legitimate opportunity and angles for their arguments, find applicable experts and generally organize and coordinate all things life insurance.

Recent cases include a situation where a large organization CEO died before the agent put a policy in force on a timely basis. Another case involved a bank CEO who was party to a significant split dollar agreement which was tied in to a severance package/employment agreement. The plan was a disaster and there was no ongoing management by the agent or employer and the employment agreement was violated.

A couple of situations involved actual mistakes (ultimately admitted when presented with definitive proof) made on the part of insurance carriers where we were able to obtain contract remediation or settlements.

Recently, I got a \$2,000,000 settlement for a client who was the victim of fraud and didn't even know it until I informed him.

I've even acted as an expert witness in a murder trial regarding life insurance.

The bottom line is that if I agree with the argument on the table and I believe it has merit, I'll go to the ends of the earth to find and coordinate what is needed for the litigation or arbitration at hand.