



# 2016 Midyear Meeting

## February 20-25

### HIGHLIGHTS

Data Breach: Principles, Practice,  
and the Public Interest

IADC Talks: Social Justice

Becoming an Agent of Change -  
Promoting Gender Equality in the  
Legal Workplace

The Power of Brands

What Practitioners Need to Know  
About the New Scope of Discovery  
and How to Avoid Spoliation Sanctions



**Foundation Forum Speaker**  
**Shiza Shahid**

*Co-Founder and Global Ambassador  
of the Malala Fund*



The Inn at Spanish Bay™ - Pebble Beach, California

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*Planning team (l to r): Mark and Anne Beebe; Karen and Joe O'Neil; Sharon and John T. Lay*

## WELCOME TO PEBBLE BEACH®

We are so excited to return to one of the IADC's all-time favorite locations for our 2016 Midyear Meeting - Pebble Beach, California. The Inn at Spanish Bay is a spectacular venue where we will learn from leading experts during our educational sessions, develop and enhance our personal and professional relationships, and soak in the breathtaking surroundings. Our planning team and staff have worked hard to put together a meeting you will truly enjoy.

Shiza Shahid, Co-Founder and Global Ambassador of the Malala Fund, kicks off our meeting on Sunday, February 21, immediately after our Opening Session. We thank The Foundation of the IADC for providing such a strong and empowering speaker. Throughout the week, you will want to attend sessions featuring several other compelling speakers, including Stuart Mauney, who will address depression and substance abuse in the legal profession, and Scott Bornstein who will help us explore and understand the power of memory in both our personal and professional lives.

The heart of our meeting lies in the opportunity to learn from the experts and share our collective wisdom with fellow members. Our CLE Steering Committee Chair, Mollie Benedict, her Committee, and the CLE Committee have spent countless hours putting together a meaningful program for all. IADC Talks continues and will feature the organization's newest Committee, the Social Justice Pro Bono Committee. Distinguished IADC members will share their valued and meaningful experiences with pro bono work. Other programs will address disability discrimination and accommodation; the ethical and malpractice pitfalls in electronic discovery; human trafficking in the 21st century; the recent amendments to the federal rules, and jury research from pre-discovery to post-trial.

On the social side, get ready to have fun and enjoy the unique beauty of the Monterey Peninsula, our Theme Party - *Fore! Play Golf* and our final evening together - *California Dreamin'* Dinner Dance. We have planned plenty of other receptions, tours, and activities designed to provide you with memorable times with your IADC friends, new and old. All of your favorites will be included: tennis tournaments, golf on majestic and challenging courses, and shopping and dining in picturesque Carmel.

The Monterey Peninsula is filled with wineries, shopping, and beautiful scenery. This will be a fantastic meeting. We look forward to seeing you and sharing everything we have planned for you.

Warm personal regards,  
Joe and Karen O'Neil



## Foundation Forum Speaker Shiza Shahid *Co-Founder and Global Ambassador of the Malala Fund*

Sunday, February 21, 10:15 - 11:30 a.m.

Shiza Shahid is an entrepreneur and advocate, passionate about leveraging philanthropy, venture capital, technology, and the media to drive scalable social impact and women's empowerment.

Shiza co-founded the Malala Fund with Nobel Prize winner Malala Yousafzai, and led the organization as founding CEO. She is now focused on supporting startups, innovators and entrepreneurs, particularly women, who are creating positive global impact. She is an advocate for women entrepreneurs, and hosts Women's Story-telling Salons bringing together leading female entrepreneurs to collaborate.

Shiza grew up in Pakistan as a vocal advocate for social change. She graduated from Stanford University with University Distinction. She was a business analyst with McKinsey & Company. She is also a graduate of Singularity University where she studied how to apply technology towards the goal of solving gender inequities.

Shiza has received many awards for her work including Times 30 under 30 World Changer, Forbes 30 under 30 Social Entrepreneur, WEF Global Agenda Council, Tribeca Institute Disruptive Innovator. She has been featured in multiple publications including *Forbes*, *Fast Company*, *Elle*, *Glamour*, *Town and Country*, *The Edit*, *CNN*, *ABC*, *Al Jazeera*, *MSNBC* and others.

Shiza is a prominent speaker on millennial and women's entrepreneurship. She speaks frequently at major international convenings including Aspen Ideas Fest, Milken Global Institute, Forbes Women, Fortune Most Powerful Women, Inc Women, Women Moving Millions, World Economic Forum and others.

*The Foundation Forum speaker is sponsored by The Foundation of the IADC.*



## Purchase a Raffle Ticket and Support Your Foundation!

Tickets are \$100 each.

You can support the Foundation of the IADC by purchasing a raffle ticket when you register for the Midyear Meeting or onsite at the IADC Information Desk. Our raffle package is courtesy of The Fairmont Southampton - Bermuda in Southampton, Bermuda, home of the 2016 Annual Meeting.

This raffle prize includes three nights accommodations for two people at The Fairmont Southampton - Bermuda, including one round of golf, with cart, for two people and one spa treatment per person.

The drawing will be held at the Dinner Dance on February 24. You do not need to be present to win.

## JOIN THE CONVERSATION



IADC



@IADCLaw



International  
Association of  
Defense Counsel

Connect with the IADC's social media accounts and use our meeting hashtag [#IADCmeetings](#) when posting on Facebook or Twitter. We want to see your photos, hear about your favorite moments, and experience the meeting along with you!

## Sunday, February 21

7:30 - 8:30 a.m.

### TRANSPORTATION COMMITTEE BUSINESS MEETING

#### Don't Pay Sticker Price on Medical Expenses - Practice Tips and Developing Law

During this business meeting there will be a short presentation. *This presentation will not be eligible for CLE credit.*

**Speaker:** *Walter H. Boone, Balch & Bingham LLP, Jackson, MS USA*

7:30 - 8:30 a.m.

### ALTERNATIVE DISPUTE RESOLUTION/TECHNOLOGY/TRIAL TECHNIQUES AND TACTICS

#### Technology Strategies for Lawyers Who Want to Win

Are you defending your cases for the Generation X and Y jurors? Are you prepared to talk to these jurors who turn to the internet and social media to get news and information, rather than to the evening network news or print newspaper? Are you taking depositions for people who now say that they see their smart phone as an "extension of their brain?" If not, 60 percent of the jury will not be listening to you. This program is designed for trial lawyers who want to learn how to best weave technology into their practices so that their clients are best represented in front of juries who expect the actors on *Law and Order* to be in their courtroom.

This program will offer insights and options on the latest and best technology available for defense attorneys to use in depositions, mediations, arbitrations, and trials. It will provide practical tips, tools, and strategies for practitioners to easily adopt into their practices so that they can effectively communicate with jurors who are used to technology in every aspect of their lives and expect it in the courthouse. This program is for lawyers who know that the effective use of technology is the only way to win.

DIRECTLY FOLLOWING THIS CLE PROGRAM THERE WILL BE A SHORT TRIAL TECHNIQUES AND TACTICS COMMITTEE BUSINESS MEETING. PLEASE STAY IF YOU ARE ABLE.

**Speakers:** *Douglas J. Moore, Irwin Fritchie Urquhart & Moore LLC, New Orleans, LA USA; Thomas G. Oakes, Thomas G. Oakes Associates, Cherry Hill, NJ USA*

7:30 - 8:30 a.m.

### AMICUS CURIAE/APPELLATE PRACTICE/BUSINESS LITIGATION

#### Don't Get Thrown Out of Court: Common Mistakes in Establishing Federal Subject Matter Jurisdiction

Sleeper jurisdictional defects can be a plaintiff's ticket out of a defense verdict, so it pays to avoid them. This panel will examine common pitfalls of federal-court subject matter jurisdiction, how to spot them, and how to fix them. Why focus on jurisdiction? Federal jurisdiction is a magic bullet. Jurisdictional defects cannot be waived, any party can raise them at any time, and courts must scrutinize jurisdiction even if no one disputes it. Courts of appeals regularly raise jurisdictional defects that went unnoticed through years of litigation. If there is no jurisdiction, the case – and hard-won verdict – must be thrown out.

**Speakers:** *Robert A. Brundage, Morgan Lewis & Bockius LLP, San Francisco, CA USA; Kendall Harrison, Godfrey & Kahn, Madison, WI USA; Mary-Christine "M.C." Sungaila, Haynes and Boone, LLP, Costa Mesa, CA USA*

7:30 - 8:30 a.m.

### DIVERSITY/EMPLOYMENT LAW/INTERNATIONAL

#### Disability Discrimination and Accommodation: Cutting Edge Issues and Solutions from Around the Globe

This interactive program will feature presenters from inside and outside the U.S. The program will address a variety of employment scenarios and include discussions of when certain conditions such as obesity, pregnancy, and depression may be considered disabilities, as well as potential opportunities, challenges, and risks in hiring disabled persons and accommodating disabilities in the workplace. Nadine O. Vogel will lead the discussion. She is the CEO of Springboard Consulting LLC, a global company working with national and multinational corporations, governments, and agencies around the world to mainstream disability in the global workforce and marketplace. Vogel is a 2015 Brava Award Winner, one of Smart CEO's powerhouse female business leaders, and a 2015 Humanitarian Award Honoree from the American Conference on Diversity.

**Speakers:** *Molly Hughes Cherry, Nexsen Pruet, LLC, Charleston, SC USA; Noriko Higashizawa, City-Yuwa Partners, Tokyo, Japan; Cecilia Lahaye, Van Olmen & Wynant, Brussels, Belgium; Nadine Vogel, CEO and Founder, Springboard Consulting LLC, Mendham, NJ USA*





## Sunday, February 21 continued...

7:30 - 8:30 a.m.

### TOXIC AND HAZARDOUS SUBSTANCES LITIGATION Epigenetics in the Courtroom

Epigenetics has the potential to change the face of toxic tort litigation. Epigenetics is the encoding of information on or over DNA by environmental factors. This encoding can change gene expression and some studies suggest those changes may be passed on for generations after initial exposure. The field of epigenetics is changing the way we look at causation and the lasting effects of environmental exposures on subsequent generations—and it is already creeping into expert analysis. This panel of distinguished speakers will give a primer on epigenetics, the legal challenges to its use, and how science may soon change the way causation is established in many cases.

**Speakers:** *Joshua D. Lee, Schiff Hardin LLP, Chicago, IL USA; Gary Marchant, Ph.D, Sandra Day O'Connor College of Law at Arizona State University, Tempe, AZ USA; Howard Sandler, MD, Sandler Occupational Medicine Associates, Inc., Melville, NY USA*

8:45 - 10:15 a.m.

### Opening Session



10:15 - 11:30 a.m.

### Foundation Forum Speaker Shiza Shahid

THE FOUNDATION FORUM SPEAKER IS SPONSORED BY THE FOUNDATION OF THE IADC.

For a description on Shiza Shahid and the Forum, see page 2.

## Monday, February 22

7:30 - 8:30 a.m.

### CONSTRUCTION LAW AND LITIGATION COMMITTEE BUSINESS MEETING



7:30 - 8:30 a.m.

### BUSINESS LITIGATION/INTELLECTUAL PROPERTY/ INTERNATIONAL

### Around the World: How Litigation Strategy Is Going Global

No longer are litigation matters strictly domestic affairs. We are seeing an unprecedented increase in the amount of litigation, both personal injury and commercial, that is planned and executed internationally. On the personal injury side, significant class action litigation that occurs in the United States is often coordinated with similar class action litigation that occurs in Canada. On the commercial litigation side, because commerce is now global, commercial litigation is playing out on a global battlefield. Intellectual property litigation, in particular, is being planned and coordinated globally with businesses selecting jurisdictions for litigation in an attempt to develop precedent that can be used in other parts of the world. This experienced panel will discuss this trend and how it will impact litigation and business practices going forward.

**Speakers:** *Kurt B. Gerstner, Lee International IP & Law Group, Seoul, Korea; Jeffrey A. Pade, Paul Hastings LLP, Washington, DC USA; Steven Rosenhek, Fasken Martineau DuMoulin LLP, Toronto, ON Canada*

7:30 - 8:30 a.m.

### DRUG, DEVICE AND BIOTECHNOLOGY

### Avoiding the Pitfalls of Privilege: A Guide in Pharmaceutical Litigation

This program discusses the attacks made by the plaintiffs bar on privilege claims in mass tort litigation in the age of email/e-docs and the strategies to assist your client in preparing for and defending against these attacks. Exemplar documents and scenarios are presented and discussed to educate in-house and outside counsel about how to implement “best practices” in advance of litigation and educate your business clients about how to maintain and preserve privileges.

**Speakers:** *Andrew W. Boczkowski, GlaxoSmithKline, Philadelphia, PA USA; Todd P. Davis, King & Spalding LLP, Atlanta, GA USA; Robert K. Woo, Jr., King & Spalding LLP, Atlanta, GA USA*

7:30 - 8:30 a.m.

## PRODUCT LIABILITY

### The Plaintiffs Bar AIEG: What You Don't Know Could Hurt You

This program reveals information about the Attorneys Information Exchange Group (AIEG), aka the “Plaintiffs Bar Top Secret Databank of Defendants’ Documents.” The AIEG is a secretive group affiliated with the American Association for Justice (AAJ). Most defense lawyers and claims professionals have probably never heard of it. (Indeed, one of the speakers had been practicing law for nearly 20 years before he heard about the AIEG, and its main office is located a mile from his house!)

The AIEG touts itself as an “information sharing repository” for plaintiffs’ lawyers. What we are learning is that plaintiffs’ lawyers go to great lengths to make sure they can share your (and your insureds’ and clients’) documents with all other AAJ and AIEG members. This dynamic program will address the following:

- What is the AIEG?
- How does it operate?
- Actions taken by plaintiffs’ counsel to keep your documents after litigation is over.
- Improper sharing of confidential documents by plaintiffs’ lawyers via the AIEG.
- Strategies you can employ to keep your company’s/insured’s/client’s information from going to the AIEG and being recycled and used in new lawsuits.

**Speakers:** R. Bruce Barze, Jr., Balch & Bingham LLP, Birmingham, AL USA; Marguerite E. Zinz, Thacker Martinsek LPA, Toledo, OH USA

7:30 - 8:30 a.m.

## PROFESSIONAL LIABILITY

### Ethical and Malpractice Pitfalls in Electronic Discovery

*\*This program is eligible for ethics credit.*

Participate in an interactive discussion on the attorneys’ fiduciary duty of competency in representing a client’s electronic discovery technology. Learn about the numerous legal malpractice pitfalls in such representation. The program will address American Bar Association and state ethical rules governing an attorney’s obligation to apply new technologies to client data. You will learn how to reduce client costs by appropriate use of experts and appropriate technology-vendors; hear about courts and disciplinary authorities; and learn how to deal with attorneys who “missed the message.”

**Speakers:** Barry G. Kaiman, Lewis Brisbois Bisgaard & Smith LLP, Los Angeles, CA USA; David M. Siesko, Arch Insurance, Jersey City, NJ USA

8:45 - 10:15 a.m.

### Advising Family Companies Around the World: Survival of the Fittest?

*Sponsored by the International Committee*

The success of family companies turns much of modern business teaching and corporate governance scholarship on its head. The triumph of the public company is limited to Europe and North America. The economies of most of the rest of the world—developed as well as emerging—continue to be dominated by family-focused businesses that control a wide range of companies, not just individual firms.

Family companies are much more than just half-formed public companies. They are a category of companies in their own right. They have unique advantages in the form of long-term thinking and concentrated ownership. They have unique disadvantages in the form of succession problems and family feuds. And they have unique ways of dealing with these problems. Given the sheer number of family companies of all sizes and their economic importance, they deserve a lot more attention, in particular from two groups of people: business professionals and theorists of the firm. Learn how different the operation of a family-owned business is from the publicly-owned businesses and how that affects the job of the inside and outside legal counsel.

**Moderator:** *Emmanuèle Lutfalla, SCP Soulie & Coste-Floret, Paris, France*

**Speakers:** *William J. Butler, McDermott Will & Emery LLP, Chicago, IL USA; John Linders, Banning N.V., ‘s-Hertogenbosch, Netherlands; Barbara E. Matthews, The Hagerty Group, LLC, Traverse City, MI USA; Jennifer Pendergast, The Family Business Consulting Group, Chicago, IL USA*





## Monday, February 22 continued...

8:45 - 10:15 a.m.

**Data Breach: Principles, Practice, and the Public Interest**  
*Sponsored by the Business Litigation Committee, In-House and Law Firm Management Committee, and Technology Committee*

**SPONSORED BY DISCOVIA**

Almost weekly there is a new headline about a major data breach and the legal fallout from it. Part one of this two-part program will explain basic principles of data privacy; the challenges presented by the segmented federal regulatory structure together with 47 state breach notification burdens; and the need of organizations to self-assess breach exposure, implement reasonable privacy policies, insure vendor compliance, and follow available standards (NIST, ISO 2700, PCI). This program will culminate in an overview of FTC regulatory authority and expectations by that agency's Assistant Director in the Division of Privacy and Identity Protection.

**Moderator:** *Stephanie M. Rippee, Watkins & Eager PLLC, Jackson, MS USA*

**Speakers:** *Martin J. Healy, Sedgwick LLP, Newark, NJ USA; Bruce H. Raymond, Raymond Law Group LLC, Glastonbury, CT USA; Nithan Sannappa, Federal Trade Commission, San Francisco, CA USA; Jo Anne Schwendinger, Deere and Company, Moline, IL USA*

10:30 a.m. - 12:00 p.m.

**CLE/GENERAL INTEREST**

**Taking Action: Responding to Depression and Substance Abuse in the Legal Profession**

*\*This program is eligible for Substance Abuse credit.*

There is a prevalence of depression and substance abuse in the legal profession. Some studies estimate that of the one million lawyers in this country, approximately one fourth of them suffer from some sort of depression. Reports from lawyer assistance programs indicate that 50-75 percent of lawyer discipline cases nationwide involve chemical dependency. However, there are a number of ways lawyers can seek help for problems and even avoid them altogether, achieving a balanced life and fulfillment in the practice of law.

This presentation is for lawyers at all stages of practice and will highlight and address the genesis of some sobering facts. It will also focus on ways lawyers can achieve balance in their practice by discussing the twelve steps toward fulfillment in the practice of law set forth in the book, *Lawyer Life: Finding a Life and a Higher Calling in the Practice of Law*, written by the Honorable Carl Horn, III, a former U.S. Magistrate Judge for the Western District of North Carolina and published by the ABA in 2003.

**Speaker:** *C. Stuart Mauney, Gallivan, White & Boyd, P.A., Greenville, SC USA*

12:15 - 1:45 p.m.

**GENERAL INTEREST**

**IADC Talks: Social Justice**

*Sponsored by the In-House and Law Firm Management Committee and Social Justice Pro Bono Committee*

"Pro bono" comes from the Latin pro bono publico, meaning "for the public good." This panel of distinguished IADC members will discuss their meaningful experiences of engaging in the legal profession's highest calling—ensuring access to justice for the poor and disenfranchised. The presenters will discuss the challenges that they faced in providing pro bono services and the impact their contributions made in the lives of others.

*Light lunch offerings will be available for attendees.*

**Moderator:** *Craig A. Thompson, Venable LLP, Baltimore, MD USA*

**Speakers:** *Daniela Karollus-Bruner, CMS Reich-Rohrwig Hainz Rechtsanwälte GmbH, Vienna, Austria; Matthew D. Keenan, Shook, Hardy & Bacon L.L.P., Kansas City, MO USA; Michael W. Magner, Jones Walker LLP, New Orleans, LA USA; Christine A. Marlewski, Gray Robinson P.A., Tampa, FL USA; Robert F. Redmond, Jr., McGuireWoods LLP, Richmond, VA USA*

5:15 - 6:15 p.m.

**INTERNATIONAL COMMITTEE BUSINESS MEETING**

## Tuesday, February 23

7:30 - 8:30 a.m.

**BUSINESS LITIGATION/CORPORATE COUNSEL**

**Dealing with Difficult Clients or How to Respectfully Bite the Hand that Feeds You**

*\*This program is eligible for ethics credit.*

As a follow-up to the 2015 IADC Midyear Meeting presentation on dealing with difficult lawyers, come get sage advice and tips on how to deal with, manage, and improve upon relationships with difficult clients (fellow IADC members excluded).

**Speakers:** *Cynthia P. Arends, OneBeacon Insurance Group, Minnetonka, MN USA; J. Calhoun Watson, Sowell Gray Stepp & Laffitte, LLC, Columbia, SC USA*







7:30 - 8:30 a.m.

#### INSURANCE AND REINSURANCE

### The Number of Occurrences Dilemma

The issue of whether a claim or series of claims involves one or more than one “occurrence” (and, if so, how many) is a question that is at the forefront of coverage litigation. The issue is particularly complicated as it has produced battles not only between policyholders and insurers, but among insurers as well. The financial stakes for how this issue is resolved can be enormous. This panel will explore recent developments in this area, including related concepts of “batching” and “occurrence integration” and will offer practical advice and tips for outside and in-house counsel. This is an issue that cuts across virtually all lines of insurance and categories of claims and one that both coverage counsel and the defense attorney handling the claim need to understand in order to protect the interests of their client in complicated claims situations.

**Speakers:** John T. Harding, Jr., Lewis, Brisbois, Bisgaard & Smith LLP, Boston, MA USA; Sonia Valdes, MedMarc Insurance Group, Washington, DC USA; Bryan M. Weiss, Murchison & Cumming LLP, Los Angeles, CA USA

DIRECTLY FOLLOWING THIS CLE PROGRAM THERE WILL BE A SHORT INSURANCE AND REINSURANCE COMMITTEE BUSINESS MEETING. PLEASE STAY IF YOU ARE ABLE.

7:30 - 8:30 a.m.

#### MEDICAL DEFENSE AND HEALTH LAW/PRODUCT LIABILITY

### Defending Against the Inflated Life Care Plan

This program will focus on how to defend against the overinflated life care plan in catastrophic injury cases. The program will consider defense strategies and areas of attack on most life care plans. Alternative methods and trial strategy related to diminishing damages will also be discussed.

**Speakers:** Thomas J. Hurney, Jackson Kelly PLLC, Charleston, WV USA; Stuart P. Miller, Mitchell, Williams, Selig, Gates & Woodyard, PLLC, Little Rock, AR USA

DIRECTLY FOLLOWING THIS CLE PROGRAM THERE WILL BE A SHORT MEDICAL DEFENSE AND HEALTH LAW COMMITTEE BUSINESS MEETING. PLEASE STAY IF YOU ARE ABLE.

7:30 - 8:30 a.m.

#### SOCIAL JUSTICE PRO BONO

### A Primer: Representing Refugees in Immigration Court

Learn how you can actively participate in the IADC’s new social justice initiative from Robert Redmond, Chair of the IADC’s Social Justice Pro Bono Committee. Listen as he will present a primer on representing refugees in immigration court. Topics will include initial client interview, initial pleading stage, developing a persuasive relief request, marshalling evidence for relief, presenting witnesses, presenting documents, and handling post-trial matters.

**Speaker:** Robert F. Redmond, Jr., McGuireWoods LLP, Richmond, VA USA

7:30 - 8:30 a.m.

#### WHITE COLLAR DEFENSE AND INVESTIGATION

### Knock Knock. Who’s There? It’s the Feds and We Have a Search Warrant for All of Your Company’s Computers and Records

This entertaining panel will provide the do’s, the don’ts, and the best game plan available to practitioners in terms of how to respond when federal or state agents show up at their corporate client’s offices with a request for interview, a grand jury subpoena, or a search warrant. This program will also focus on how to handle similar situations when they occur overseas. This is an extremely sensitive and important issue that both in-house and outside counsel are likely to face at some point in their careers. Be prepared!

**Moderator:** Douglas S. Brooks, Libby Hoopes, P.C., Boston, MA USA

**Speakers:** Peggy Kubicz Hall, Greene Espel P.L.L.P., Minneapolis, MN USA; Michael W. Magner, Jones Walker LLP, New Orleans, LA USA; Alfred R. Paliani, Quality King Distributors, Inc. / QK Healthcare, Inc., New York, NY USA

## Tuesday, February 23 continued...

8:45 - 10:15 a.m.

### **What Practitioners Need to Know About the New Scope of Discovery and How to Avoid Spoliation Sanctions**

*Sponsored by the Drug, Device and Biotechnology Committee*

Important amendments to the Federal Rules of Civil Procedure have been approved by the Supreme Court and are effective December 1, 2015. The new rules are designed to improve the discovery process, including establishing that discovery must be proportional to the claims and defenses in the action. Additionally, the amendments for the first time set reasonable criteria for the imposition of spoliation sanctions. Lawsuits are increasingly becoming litigations about litigations, particularly when the merits are lacking. The Actos litigation, for example, has been a case study in different applications of different rules with similar fact patterns leading to widely varying results.

The new rules are the culmination of years of work by many invested in improving process and results on this ever changing and challenging subject. Inside and outside counsel must now keep the momentum going and continue to work for appropriate interpretation and implementation of these rules, so as to make sure the hard work translates into new and impactful results. The reality is while the new rules create an opportunity for a much more rational and predictable approach to discovery and preservation issues, those that prefer the old approach will be working to maintain the status quo and are already coordinating to blunt the intended impact of the new rules. There remains significant room for interpretation in several important areas of the new rules, and how those areas are interpreted will dictate whether spoliation sanctions continue to be an ever present and common threat to corporations.

In this program, IADC members will learn where the battlegrounds are in the new rules and how to prepare themselves and their clients to prevail on these issues.

**Moderator:** *Jeffrey R. Lilly, Gordon & Rees, LLP, Austin, TX USA*

**Speakers:** *Alex Dahl, Lawyers for Civil Justice, Washington, DC USA; Robert L. Levy, Exxon Mobil Corporation, Houston, TX USA*

8:45 - 10:15 a.m.

### **The Power of Brands**

*Sponsored by the In-House and Law Firm Management Committee*

This thought-provoking presentation will challenge the listener to understand and ultimately unlock the mystery of why powerful brands achieve their sustainable impact. The presentation will first address company and product brands and then will apply the same principals to law firms and individual lawyers. The principals taught will enable companies, law firms, and individuals to refresh and re-energize their brand in a unique, “human-focused” manner.

**Speakers:** *Katherine E. Hollar, Chief Marketing Officer, Shook, Hardy & Bacon LLP, Kansas City, MO USA; George Schell, Chief Marketing Counsel, Coca-Cola, Atlanta, GA USA*

10:30 a.m. - 12:00 p.m.

### **CLE/GENERAL INTEREST**

### **Memory Power for Lawyers (and All Those With Too Much On Their Minds)**

*Sponsored by the Medical Defense and Health Law Committee*

Whether it's knowing the names and details of clients or acquaintances, a room full of people, passwords, or numbers, key facts from negotiations or closing arguments, the surest path to credibility, influence, and success is training yourself to have a remarkable memory.

In this unforgettable session, explore the science of MemoryPower and master Scott Bornstein's system for unfailing recall for names and faces. Sharpen personal and professional performance, impact important relationships, and most importantly, manage the information overload in your life.

**Speaker:** *Scott Bornstein, MemoryPower, Mission Viejo, CA USA*





2:00 - 3:15 p.m.

DIVERSITY/INSURANCE AND REINSURANCE/INSURANCE  
EXECUTIVES/PROFESSIONAL LIABILITY

## Understanding the Concept of Implicit Bias and Its Impact on the Practice of Law

*\*This program is eligible for ethics credit or Elimination of Bias credit in applicable states.*

Traditional thought held that discrimination was always the result of conscious and deliberate conduct. Current research, however, shows that we all make choices that discriminate against one group and in favor of another without even realizing we are doing it and against our own conscious belief that we are being unbiased in our decision making, even though we do not possess any explicit prejudice or ill will. This program will explore the concept of implicit bias, and discuss the correlation between bias and how we process information as well as its sources. It will also offer insight into how the courts are dealing with this concept and the ethical implications involved.

**Moderator:** Timothy J. Gephart, Minnesota Lawyers Mutual Insurance, Minneapolis, MN USA

**Speakers:** Pamela W. Carter, Carter Law Group, LLC, New Orleans, LA USA; Jay Barry Harris, Fineman Krekstein & Harris, P.C., Philadelphia, PA USA; Anne Johnson, Minnesota Lawyers Mutual Insurance, Minneapolis, MN USA

3:30 - 5:00 p.m.

## Human Trafficking in the 21st Century: Conceptual Frameworks and Responses

*Sponsored by the Diversity Committee*

News feeds and media programming are replete with reports of human trafficking – sexual and labor exploitation of men, women, and girls. The conventional depiction is of an organized transnational criminal activity which can be successfully addressed through law enforcement initiatives. This presentation challenges this dominant perception, advocating understanding of the deeper underlying inequities of laws and policies that permit and foster human trafficking. The presentation will discuss the dominant perceptions and approaches, then offer a more comprehensive, structured understanding of and response to human trafficking.

**Speaker:** Dean Karen E. Bravo, Indiana University School of Law, Indianapolis, IN USA

*\*This program will be followed by an International Committee Wine Tasting Reception at 5:00 p.m. The reception is a ticketed event which requires registration; see page 12 for more details. Registration is not required if attending the CLE session only.*

# Wednesday, February 24

7:30 - 8:30 a.m.

ALTERNATIVE DISPUTE RESOLUTION COMMITTEE BUSINESS MEETING

7:30 - 8:30 a.m.

BUSINESS LITIGATION

## Daimler v. Bauman: Are You Defending Lawsuits Where You Don't Belong?

The U.S. Supreme Court's decision in *Daimler v. Bauman*, 134 S.Ct. 746 (2014) just celebrated its second birthday. This session explains the case, discusses its potentially groundbreaking effects limiting the reach of personal jurisdiction (especially for corporations doing business nationally), examines subsequent circuit court cases that have construed it, and asks whether we should laud or lament the case.

**Speakers:** Christopher D. Brown, Beasley, Demos & Brown, LLC, Miami, FL USA; Peter M. Donnelly, Ingersoll-Rand Company, Davidson, NC USA; Phillip S. Sykes, Butler Snow LLP, Ridgeland, MS USA

7:30 - 8:30 a.m.

CLASS ACTIONS AND MULTI-PARTY LITIGATION

## The Telephone Consumer Protection Act, Rule 23, and the FCC Declaratory Ruling and Order: The Approaching Tsunami of Litigation for Business-to-Customer Calls

Commissioner Ajit Pai in his dissent to the FCC's July 10, 2015 Declaratory Ruling and Order announced that, "This Order will make abuse of the TCPA much, much easier. And the primary beneficiaries will be trial lawyers, not the American public." The TCPA's authorization of up to \$1,500 per call, text message, or fax sent in violation of its prohibitions created a minor flood of litigation. The FCC's Ruling and Order has the potential to turn the flood into a tsunami. Join the discussion of recent developments in Rule 23 and TCPA case law that threatens enormous liability to all businesses that use telephone, emails, and texts to communicate with customers.

**Speakers:** Sara Anne Ford, Lightfoot, Franklin & White, L.L.C., Birmingham, AL USA; Frank A. Hirsch, Jr., Alston & Bird LLP, Raleigh, NC USA



## Wednesday, February 24 continued...

7:30 - 8:30 a.m.

### **DRUG, DEVICE AND BIOTECHNOLOGY/INTERNATIONAL** **The EMA is in Your Case, Now What? What You Need to Know about the EMA and How to Effectively Use Foreign Regulatory Decisions to Your Advantage**

This program will highlight the major differences for prescription drug approval between the FDA and the EU's EMA. Understanding the differences are important for product liability trial lawyers because EMA risk assessments are increasingly admitted into evidence in U.S. trials.

**Speakers:** *Bruce R. Parker, Venable LLP, Baltimore, MD USA; Hein van den Bos, Hogan Lovells, Amsterdam, Netherlands*

7:30 - 8:30 a.m.

### **ENVIRONMENTAL AND ENERGY LAW/TOXIC AND HAZARDOUS SUBSTANCES LITIGATION** **Use of State "Public Trust" Actions and Citizen Suits to Address Environmental Trends**

PCE litigation in California; recovering MTBE costs in New York, Vermont, and Pennsylvania; "home rule" to halt hydraulic fracturing; Dutch citizens climate change lawsuit against its government – come hear an interactive discussion regarding the increased use by states, citizens, and environmental groups of nuisance law, local government rules, and/or "public trust" doctrine to address environmental issues and strategies for combating this emerging litigation trend.

**Speakers:** *Candace A. Blydenburgh, McGuireWoods LLP, Richmond, VA USA; Andrew Thompson, Smith, Gambrell & Russell, Atlanta, GA USA*

8:45 - 10:15 a.m.

### **After the Data Breach: A Hands On "Table Top" Demonstration About How to Counsel Clients in Crisis**

*Sponsored by the Business Litigation Committee, In-House and Law Firm Management Committee, and Technology Committee*

**\*This program is eligible for ethics credit.**

This program is the follow-up session to "Data Breach: Principles, Practice, and the Public Interest." We will work through a mock scenario distilled from thousands of actual breaches, with decision points for participants at every crucial juncture: incomplete and murky facts, red herrings, and the pressure of responding under a time crunch. Key takeaways include: (i) the critical role played by outside legal counsel in breach preparedness, under the cloak of the attorney-client privilege, and in breach response; (ii) practical guidance on counsel's role in formulating an incident response plan; and (iii) real world insights into the most common mistakes organizations make when investigating and responding to a suspected data breach.

**Moderator:** *Stephanie M. Rippee, Watkins & Eager, Jackson, MS USA*

**Speakers:** *Serge Jorgensen, The Sylint Group, Sarasota, FL USA; Paul Nihkinson, Beazley, San Francisco, CA USA; Peter J. Pizzi, Connell Foley LLP, New York, NY USA; William R. Sampson, Shook, Hardy & Bacon L.L.P., Kansas City, MO USA*

8:45 - 10:15 a.m.

### **Becoming an Agent of Change—Promoting Gender Equality in the Legal Workplace**

*Sponsored by the Corporate Counsel Committee and Diversity Committee*

It has been pointed out that 83 percent of law firm equity partnerships are held by men. This session will educate us on what these leaders can and must do to proactively mentor, promote, and fairly compensate women who aspire to leadership in a law firm or in-house counsel environment. We will learn how men at all levels of the legal workforce and in all legal organizations can become agents of change, joining with women to build a more open and diverse legal profession.

**Moderator:** *Bonnie Mayfield, Dykema Gossett PLLC, Bloomfield Hills, MI USA*

**Speaker:** *Ida Abbott, Ida Abbott Consulting, San Francisco, CA USA*



10:30 a.m. - 12:00 p.m.

### **Start to Finish: Jury Research from Pre-Discovery to Post-Trial**

*Sponsored by the Drug, Device and Biotechnology Committee and Trial Techniques and Tactics Committee*

This panel discussion will focus on jury research from the start of litigation, through trial, to post-trial interviews. With the start of litigation, the program will cover how pre-discovery focus groups and venue surveys can shape and guide the discovery process. It will also outline the differences between a focus group and a mock jury. In regards to the trial, the panel will cover tactics for using a shadow jury, including the various risks and limitations, procedural considerations, disclosure to the other side and judge, “blind” shadow juries, and deliberations. Our experts will relay experiences on recent use of a shadow jury, such as the number of jurors, how they were selected and managed; the feedback used by the trial team, and how consistent the shadow jury was to the real jury. Finally they will examine post-trial interviews, including ethical considerations and will survey the general standards that various courts apply when determining whether extraneous evidence warrants a new trial. There are an increasing number of cases in this area, including appellate cases, and the audience will gain specific insight into a recent evidentiary hearing where two jurors were called to testify when it was learned that a juror conducted Google research during deliberations.

**Moderator:** *Lyn P. Pruitt, Mitchell Williams, Little Rock, AR USA*

**Speakers:** *Chris Dominic, Tsongas Litigation Consulting, Inc., Portland, OR USA; G. Brian Jackson, Butler Snow LLP, Nashville, TN USA; Bradley Keller, Byrnes Keller Cromwell LLP, Seattle, WA USA*



**Thank you to our CLE Committee and our Midyear Meeting CLE Steering Committee for their tremendous work. Their effort and dedication has resulted in fantastic programming that you will find relevant, timely, and enjoyable.**



### **CLE Committee**

#### **CHAIR**

Deborah G. Cole, *Chicago, IL USA*

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 Mary-Christine “M.C.” Sungaila, *Costa Mesa, CA USA*  
 Tamela J. White, *Huntington, WV USA*



### **Midyear Meeting CLE Steering Committee**

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 Aviva Wein, *New Brunswick, NJ USA*  
 Tamela J. White, *Huntington, WV USA*  
 Jodok Wicki, *Zurich, Switzerland*

## First Timers Introductions and Reception SATURDAY, FEBRUARY 20 INTRODUCTIONS: 4:30 - 5:30 P.M. RECEPTION: 5:30 P.M.

The First Timer program is for all IADC members and their guests who have never attended a Midyear or Annual Meeting. At this introduction, you will learn more about the IADC and the Midyear Meeting. You will also meet other First Timers and their Hosts, so throughout the week you will see familiar faces.

### Welcome to Pebble Beach® Reception

SATURDAY, FEBRUARY 20, 6:00 - 7:30 P.M.

Join us on the resort's Fairway and Troon Patios which overlook the The Links at Spanish Bay for beverages and light hors d'oeuvres. It will be a wonderful way to kick off our meeting in Pebble Beach and to connect with all of your friends and colleagues. *We encourage you to make dinner reservations for this evening prior to arriving onsite.* Resort casual attire. (Dependent on the weather, this event will be held outside so please dress appropriately.)

*SPONSORED BY SEA, LTD.*

### Fore! Play Golf Theme Party

MONDAY, FEBRUARY 22, 7:00 - 10:30 P.M.

FORE! Join us for a fun-filled evening of great food, drinks, and friends while taking a swing at one of the golf games designed for every player. Casual resort/golf attire requested.

### International Committee Wine Tasting Reception

TUESDAY, FEBRUARY 23, 5:00 - 6:30 P.M.

Please join the International Committee for a wine tasting and networking reception. Attendees will gather to network and mingle while sampling wines from local Northern California vineyards. **Advanced registration required**; cost is \$45.00 USD per person.

### California Dreamin' Dinner Dance

WEDNESDAY, FEBRUARY 24, 6:30 - 11:00 P.M.

Joe and Karen O'Neil invite you to enjoy an evening of California cuisine, local wines, good music, and dancing with friends. Nestled in The Inn, our friends at Pebble Beach will transform the ballroom into the IADC's very own winery. Enjoy the ambiance and rustic elegance of the Monterey Peninsula and dance through the night to the sounds of one of the area's best bands. Cocktail attire requested.

### Meet and Greet/Grab and Go Breakfasts

SUNDAY THROUGH WEDNESDAY, 7:00 - 9:00 A.M.

Join fellow attendees for a breakfast buffet each morning to network, discuss ideas, or plan your day. There will also be "Grab and Go" breakfasts available outside the CLE meeting rooms. The breakfasts are open to all registered attendees. Please wear your name badge every morning to breakfast.

**MEET AND GREET BREAKFASTS ARE SPONSORED BY THOMAS G. OAKES ASSOCIATES**

### Member Mix and Mingles

SUNDAY, FEBRUARY 21 AND TUESDAY, FEBRUARY 23, 5:00 - 6:30 P.M.

Meet up with friends in the Lobby Lounge of The Inn at Spanish Bay before going out for the evening at these cash bar receptions.





## After Dinner Gatherings

SATURDAY, FEBRUARY 20, SUNDAY, FEBRUARY 21, AND TUESDAY, FEBRUARY 23, 10:00 - 11:30 P.M.

Wrap up your evening with a nightcap and camaraderie at the After Dinner Gatherings held exclusively for IADC attendees at Trapp located at The Inn at Spanish Bay. Beer, house wine, and non-alcoholic drinks are complimentary with your meeting name badge.

## Morning Run and Walk

SUNDAY THROUGH WEDNESDAY

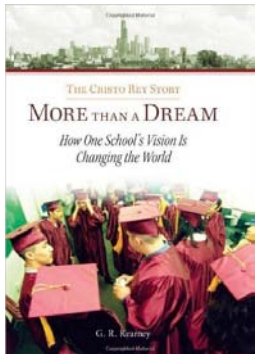
MORNING RUN: 6:30 A.M. MORNING WALK: 7:30 A.M.

Get the blood pumping in the morning and get to know other attendees at the same time! Whether you run or walk, there is time each morning for you to get moving before the day's activities. Thank you to our Morning Run Chairs Kendall and Jessica Harrison and our Morning Walk Chairs Asim and Cecille Desai.

## Book Review

MONDAY, FEBRUARY 22, 11:00 A.M. - 12:15 P.M.

*More Than a Dream: The Cristo Rey Story: How One School's Vision Is Changing the World* by G.R. Kearney



In a big city there are many big dreams, but only a special few come true...

The Cristo Rey story is one of the more improbable and inspiring educational success stories in decades. In the early 1990s, the Jesuits in Chicago had an audacious dream—to start a new college prep school for the children of Hispanic working poor. But questions needed to be answered: With so many

established Catholic high schools closing their doors, did it make sense to try to build a new one? Would parents support a demanding prep school? Could students overcome deficient academic backgrounds? How could such a school be financed? Despite many real and potential barriers, the Jesuits set to work—and in 1996, Cristo Rey Jesuit High School opened its doors in Pilsen, a predominantly Mexican-immigrant inner-city neighborhood on Chicago's Lower West Side.

In *More Than a Dream*, G. R. Kearney shows how one daring vision became a reality and turned into a resounding success. Through Cristo Rey's innovative curriculum, creative financing model, and intense devotion to the needs of Hispanic students, the lives of thousands of families continue to be changed. In demonstrating how Cristo Rey has sparked an educational revolution in urban America, the book leaves every reader with a bold challenge: attempt to change what seems unchangeable.

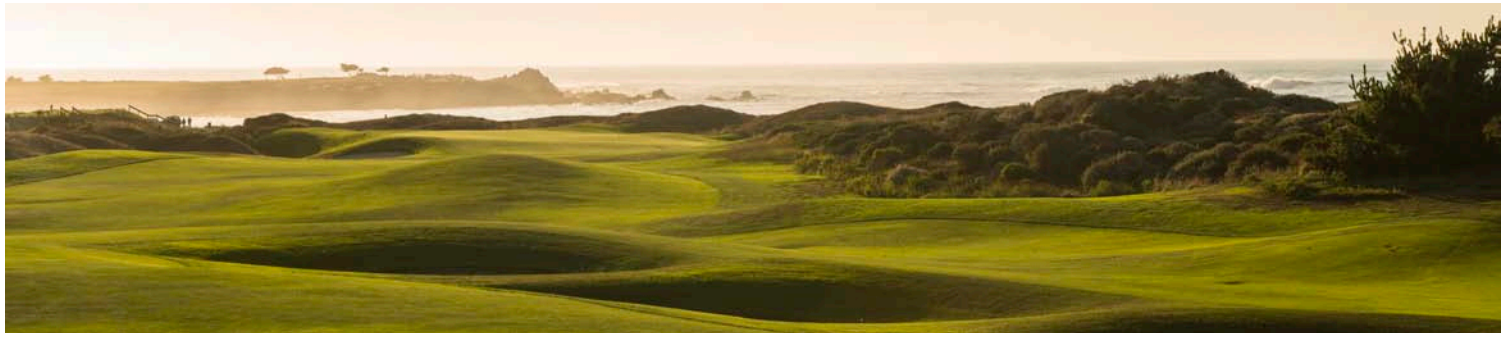
Join Cristo Rey St. Martin College Prep President Preston Kendall and Book Review Chairs Bill and Mary DiSipio for what is sure to be a lively and inspirational discussion.

## Dine-Around

TUESDAY, FEBRUARY 23, VARIOUS TIMES

The IADC invites attendees to dine together at some of the area's best restaurants. A list of participating restaurants and sign-up sheets will be available onsite at the IADC Information Desk. Spots will be filled on a first come, first served basis. All costs associated with dinner as well as transportation to/from the restaurants will be the attendee's responsibility. This is an opportunity to enjoy a night out with old friends while making new ones in the process! Thank you to our Dine-Around Chair Dominic Campodonico.





## GOLF

The game of golf is at its worldwide best at Pebble Beach Resorts. Whether you are playing the most exciting closing hole in golf, mastering the toughest hole on the PGA Tour, or simply relishing a walk in the footsteps of golf's greatest names, Pebble Beach Resorts invites you to become part of the legend.

At each course, a staff of professionals offers individual and group instruction, clinics, and group tournaments. Caddies are available. Guests of The Lodge at Pebble Beach and The Inn at Spanish Bay enjoy special booking privileges for golf reservations when arranging sleeping room accommodations. Once you have registered with the IADC and have received confirmation of your room reservation at either The Inn at Spanish Bay or The Lodge at Pebble Beach, you may then secure tee times. Tee times should be reserved by **December 28, 2015**. After this date, tee times will be confirmed based upon availability. If you cancel within (14) days of your tee time or no show on the day of play, you will be charged the green fee.

### Current Green Fees (including cart):

Pebble Beach Golf Links®:	\$495.00
Spyglass Hill® Golf Course:	\$385.00
The Links at Spanish Bay™:	\$270.00
Del Monte™ Golf Course:	\$110.00

***Pebble Beach Resorts promotes and enforces a 4.5 hour pace of play at all courses. Tee times begin every 10 minutes for 4 players.***

The IADC is currently holding the following tee times. After registering for the meeting with the IADC and receiving a reservation confirmation from the resort, please call Brendon Poss in Group Reservations at 1.831.647.7420 to secure one of these tee times. He will also be able to help you secure tee times other than those listed below.

<i>Golf Course</i>	<i>Day</i>	<i>Date</i>	<i>Time</i>	<i># of Golfers</i>
Pebble Beach	Friday	2/19/16	11:10 a.m.	8 Golfers
Pebble Beach	Saturday	2/20/16	7:50 a.m.	32 Golfers
Spanish Bay	Saturday	2/20/16	8:30 a.m.	8 Golfers
Spyglass Hill	Saturday	2/20/16	12:20 p.m.	8 Golfers
Pebble Beach	Monday	2/22/16	11:50 a.m.	20 Golfers
Spyglass Hill	Monday	2/22/16	10:30 a.m.	24 Golfers
Pebble Beach	Tuesday	2/23/16	11:50 a.m.	28 Golfers
Spanish Bay	Tuesday	2/23/16	8:20 a.m.	12 Golfers
Spyglass Hill	Tuesday	2/23/16	12:00 p.m.	24 Golfers
Pebble Beach	Wednesday	2/24/16	12:00 p.m.	24 Golfers
Spyglass Hill	Wednesday	2/24/16	12:00 p.m.	24 Golfers



## Ryder Cup Golf Tournament at The Links at Spanish Bay™

SUNDAY, FEBRUARY 21, 12:30 P.M. (SHOTGUN)

The registration fee is \$340.00 USD per person and includes green fees, carts, boxed lunch, bottled waters, prizes, and tournament costs. Thank you to Ryder Cup Golf Tournament Chairs Tony Kang and Daryl Dursum.

*SPONSORED BY EXPONENT*

## Couples Golf Event at The Links at Spanish Bay™

MONDAY, FEBRUARY 22, 12:30 P.M. (CONSECUTIVE TEE TIMES)

The registration fee is \$340.00 USD per person and includes green fees, carts, boxed lunch, bottled waters, prizes, and tournament costs. Thank you to Couples Golf Event Chairs Frank and Lorna Hirsch.



## TENNIS

The Spanish Bay Club Tennis Pavilion welcomes both the serious player and the weekend enthusiast. The tennis facility has been named the 2004 USPTA Northern California Facility of the Year and the 2002-2003 USPTA Monterey Bay Club of the Year. Thank you to Tennis Chairs Steve and Paulette Schwegman.

### Tennis Mixers

SUNDAY, FEBRUARY 21 AND MONDAY, FEBRUARY 22, 1:30 - 3:30 P.M.

Sign-up for informal and fun play! All levels welcome. The registration fee is \$35.00 USD per person and includes court fees, balls, and refreshments.

### Men's and Women's Tennis Tournaments

TUESDAY, FEBRUARY 23, 1:00 - 4:00 P.M.

Test your tennis mettle against other meeting attendees in our men's and women's tournaments. The registration fee is \$55.00 USD per person and includes court fees, balls, refreshments, prizes, and tournament fees.

## YOGA

MONDAY, FEBRUARY 22 AND WEDNESDAY, FEBRUARY 24, 9:00 - 10:00 A.M.

Yoga can be as much or as little as you want it to be. For some, it is purely a physical pursuit, keeping the body toned, strong, and flexible. For others, yoga becomes more of a mindset and a way of living. Whatever your reason for practicing, or your level of experience—we welcome you to join one or both of these classes. All skill levels welcome.



## Hands-on Cooking Class with Wendy Brodie

SUNDAY, FEBRUARY 21, 10:00 A.M. - 2:00 P.M.

Celebrated California Artist and Chef Wendy Brodie is known for her creative style with food, presentation, and table décor. In fact, she is often described as an artist whose medium is food. Today, guests have the opportunity to participate in a customized cooking class in Wendy's home, overlooking the beautiful Monterey Peninsula. This three hour class takes place in Wendy's state-of-the-art kitchen followed by dining on the meal created during the class. Wendy's entertaining stories, unique demonstrations, and hands-on participation make this a truly memorable opportunity.

The registration fee is \$420.00 USD per person and includes roundtrip transportation, a hands-on cooking lesson with celebrated chef Wendy Brodie, and lunch prepared in class.

## Land Rover Driving Experience

MONDAY, FEBRUARY 22, 1:00 - 4:00 P.M.

The Land Rover Experience provides a unique opportunity to take advantage of the unparalleled capabilities that these vehicles have to offer. Accompanied by a professional Land Rover Experience Driving Instructor, guests will take the "Off-Road Challenge" and test how well teammates can communicate, trust, and maneuver their way through side-tilts, ascents, descents, log crossings, and rock terrain with driving precision.

The registration fee is \$450.00 USD per person and includes roundtrip transportation, hands-on experience behind the wheel of Land Rover, professional instruction, and bottled waters.

## Monterey Bay Aquarium and Cannery Row

MONDAY, FEBRUARY 22, 1:00 - 5:00 P.M.

Guests enjoy the beautiful Cannery Row and the world famous Monterey Bay Aquarium which was founded in 1984 and is located on the site of a former sardine cannery. Unlock the secrets of the sea with a special VIP behind-the-scenes tour and follow aquarium docents through staff-only doors. Guests learn about exciting research projects they are conducting and how they prepare food for over 10,000 animals. Following the tour, guests enjoy the Historic Cannery Row with its shops, dining options, and view of the Pacific Ocean.

The registration fee is \$140.00 USD per person and includes roundtrip transportation, VIP entrance fee, a professional guide, and bottled waters.

## Carmel Wine Tour

TUESDAY, FEBRUARY 23, 1:00 - 5:30 P.M.

Superb soils, warm sunshine, cool ocean breezes, and slow and leisurely ripening all make the perfect recipe for the best Monterey wine. The first stop is Boekennoogen Vineyards and Winery. This winery, located in Carmel Valley at the foot of the beautiful Carmel Valley mountains, will put anyone in the mood for tasting some of the Santa Lucia Highlands finest Pinot Noirs, Chardonnays, and Syrahs. The next stop is the Heller Estates Organic Vineyards which has been producing luscious fruit-laden grapes since 1970. Guests will taste five premium wines in the Heller Estates tasting room along with perfectly paired cheeses.

The registration fee is \$125.00 USD per person and includes roundtrip transportation, entrance fees, a professional guide, and bottled waters.

## Wine and Jewelry Making Happy Hour

TUESDAY, FEBRUARY 23, 4:00 - 5:30 P.M.

Come explore your creativity and learn a new craft with IADC spouse, Shannon Reeves. Enjoy a glass of wine while you learn the basics of beading in this interactive workshop. Choose your own materials and create a fun new accessory.

The registration fee is \$40.00 per person and includes beading materials, instruction, and wine. This workshop is limited to the first 30 participants.

*If you are interested in participating in IADC sponsored tours, please register early as space is limited.*



## Tour of Big Sur

WEDNESDAY, FEBRUARY 24, 1:00 - 5:00 P.M.

You will be awestruck by some of the most spectacular ocean views in the world as a luxury motor coach transports you along California's wildly beautiful Big Sur coastline. Colorful and informative commentary by a professional tour guide begins as you depart Pebble Beach. You will travel further down the renowned Big Sur coast enjoying dramatic land and sea vistas along the way. World famous California Highway 1 South meanders through the coastal shrub and chaparral of the Santa Lucia Mountains and over one of the most photographed structures in the world—the elegant and graceful Bixby Bridge. Breathtaking scenery includes ancient redwood groves and a wide variety of California wildlife, including the much loved sea otter. Boxed lunches will be served on the bus as the bus departs the resort.

The registration fee is \$125.00 USD per person and includes a boxed lunch, roundtrip transportation, a professional guide, and bottled waters.

## ADDITIONAL ACTIVITIES

Remain close by and take advantage of the fitness and recreational facilities at the Spanish Bay Club or The Beach and Tennis Club. California's central coast is truly something worth exploring. Be sure to devote some time to do so during your stay. For more information on all there is to do at the Pebble Beach Resorts and the Monterey Peninsula, please visit [www.pebblebeach.com/activities](http://www.pebblebeach.com/activities).



## Carmel Shuttle

WEDNESDAY, FEBRUARY 24 (SEE SCHEDULE BELOW FOR TIMES)

A visit to the quaint village of Carmel will bring the shopper out in anyone. Carmel features fine boutiques, specialty stores, and art galleries all surrounded by storybook architecture. Stroll along tree shaded cobblestone sidewalks while searching for that unique treasure. Have lunch at one of the many lovely restaurants located in the hub on Ocean Avenue.

The Carmel shuttle offered on Wednesday, February 24 is complimentary to IADC attendees and guests. No advance registration required. Please arrive at the departure points a few minutes before the scheduled departure of your choice.

### Carmel Shuttle Schedule:

Depart The Inn at Spanish Bay: 10:00 a.m./11:00 a.m./  
12:00 p.m./1:00 p.m./2:00 p.m./3:00 p.m.

Depart Carmel Plaza: 10:30 a.m./11:30 a.m./12:30 p.m./  
1:30 p.m./2:30 p.m./3:30 p.m.

## FOR MORE INFORMATION

**Pebble Beach Resorts**  
[www.pebblebeach.com](http://www.pebblebeach.com)

**About the  
Monterey Peninsula Area**  
[www.seemonterey.com](http://www.seemonterey.com)  
[www.carmelcalifornia.com](http://www.carmelcalifornia.com)  
[www.carmelvalleychamber.com](http://www.carmelvalleychamber.com)

**Meeting Information**  
[www.iadcclaw.org](http://www.iadcclaw.org)

**Onsite**  
[www.iadcmeetings.mobi](http://www.iadcmeetings.mobi)

# Hotel Information

Pebble Beach Resorts®

**The Inn at Spanish Bay™ (Main Meeting Hotel)**

2700 17-Mile Drive

Pebble Beach, CA 93953

(p) 1.831.6477500

**The Lodge at Pebble Beach™**

1700 17-Mile Drive

Pebble Beach, CA 93953

(p) 1.831.624.3811

[www.pebblebeach.com](http://www.pebblebeach.com)



Pebble Beach Resorts is a legendary place. Combine a dramatic coastline and mystical forests with a rich history of world-class accommodations, warm hospitality, expert service, and grand recreation. Perhaps nowhere else on the planet does this combination come together quite like this.

## HOTEL RESERVATIONS AND ROOM RATE

The room rate, which is subject to the current state and local taxes per room, per night, is \$490.00 single/double occupancy and a nightly service fee of \$25.00 per room (The Inn at Spanish Bay) or \$20.00 per room (The Lodge at Pebble Beach), per night. The room rate and service fee include the following amenities:

- High speed wireless internet in sleeping rooms, public spaces, and meeting rooms
- Valet parking and gratuities
- Bellmen and housekeeping gratuities
- Use of the Spanish Bay Club fitness center
- Delivery of daily newspaper
- In-room coffee and tea
- Golf driving range, resort shuttle, and baggage handling and storage

**In order to make your hotel reservation, you must first register for the meeting with the IADC.** Once registered, the IADC will send you a link to the resort's secured reservation website along with your registration confirmation that will allow you to secure a hotel room at the resort. Online reservations, along with a two night room and tax deposit, must be received by January 15, 2016 at 5:00 p.m. (CST). An individual's deposit is refundable to that individual if the resort receives notice of cancellation at least seven days prior to scheduled arrival. Individual guest room reservations canceled after this time will forfeit the deposit. Exceptions will be made for cancellations, in writing, due to medical emergencies or a required appearance in trial. Availability of rooms at the group rate is subject to the IADC room block and for reservations made by January 15, 2016 when unused rooms will be released. Reservation requests received after the room block has been fully reserved or after the release of unused rooms on January 15, 2016 will be accepted on a space available basis at the group rate. **Please note the room block may fill before January 15, 2016, so we encourage you to register with the IADC so you can make your hotel reservation early.**

Check-in time is 4:00 p.m. and check out time is 12:00 p.m. Attendees arriving before check-in time will be accommodated as rooms become available. The Bell Captain can arrange to check baggage for those arriving early when rooms are not available and for guests attending functions on their day of departure.







## RESTAURANTS

**We encourage attendees to make dining reservations in advance.** For a list of suggested restaurants in the area, please go to IADC's Midyear Meeting page on IADC's website at [www.iadclaw.org](http://www.iadclaw.org). There are also a number of wonderful dining options onsite at the resort making it easy to enjoy great meals without ever having to leave the property.

Enjoy big flavors with global influences from renowned chefs who put their special, personal twist on locally grown produce, sustainable seafood, and top quality meats. Whether savoring an award-winning entrée or catching a casual bite before or after your round of golf, an exciting array of choices will tempt and indulge you. For a complete list of restaurants onsite and to make reservations, please visit [www.pebblebeach.com/dining](http://www.pebblebeach.com/dining).

## SPA

The Spa at Pebble Beach™ offers a unique menu of massages, scrubs, full-body treatments, day packages, and salon services that complement the Pebble Beach Resorts experience. The professional staff at The Spa at Pebble Beach™ are trained to help you select appropriate services and to provide impeccable personalized service for an experience that exceeds your expectations. Relax at one of only 48 spas in the world to receive the coveted Forbes Travel Guide Five-Star Award.

**Booking your spa reservation(s) in advance is strongly recommended.** To book directly with the spa, please call 1.866.612.3418.

## FITNESS CENTER

Enjoy complimentary access to a state-of-the art fitness center located at the Spanish Bay Club. The fitness center is open daily from 5:30 a.m. to 9:00 p.m.



## TRAVEL

Getting to the world-class accommodations and golf experience of Pebble Beach Resorts is easier than you might think. The Monterey Peninsula Airport (MRY), San Jose International Airport (SJC), and San Francisco International Airport (SFO) service all incoming flights. The Monterey Peninsula Airport is located 20 minutes from the resort; the San Jose International Airport is located 90 minutes from the resort; and the San Francisco International Airport is located 2.5 hours from the resort. Each airport provides a variety of ground transportation to Pebble Beach Resorts, including onsite car rentals. Please visit the airport websites listed above for further details on ground transportation. You may also call Pebble Beach Transportation at 1.831.649.7606 for more information about transportation options.

## RENTAL CARS AND PARKING ON PROPERTY

As with other IADC meeting locations, you may find that having a rental car, which allows accessibility to shopping, restaurants, recreation, and sightseeing off-property, a must-have. **We encourage you to book a rental car soon as possible as this is a busy time of year.** All airports are serviced by major rental car companies and Avis is located onsite at the resort.

As a Pebble Beach Resorts guest, you are invited to reserve any premium vehicle (G class or above) with Avis and receive exclusive valet return service to San Jose and San Francisco International airports. Visit [www.avis.com/pebblebeach](http://www.avis.com/pebblebeach) or call 1.855.215.2847 to make a reservation and use AWD #A3813000 to always receive up to 25% off.

*Please note that complimentary valet parking is included in the daily resort fee.*

## WEATHER

The average temperature in Pebble Beach in February ranges from a high of 60° F/16° C to a low of 40° F/4° C at night. Weather can always be unpredictable though, so we encourage you to check the forecast as the meeting gets closer at [www.weather.com](http://www.weather.com).

## SPECIAL NEEDS

If you will have special needs during the meeting (i.e. diet or accessibility), please let the IADC office know in advance of the meeting by calling 1.312.368.1494 or send an email to Rebecca Zurcher, Director of Meetings, at [rzurcher@iadclaw.org](mailto:rzurcher@iadclaw.org).

## ATTIRE

Meetings and Events: Resort casual (slacks, shorts, golf shirt, button down/blouse) is appropriate for committee meetings and CLE programs. The Welcome Reception and other receptions call for comfortable and casual dress, although please note that it does get cooler in the evenings. For the Theme Party, comfortable and casual resort or golf attire is requested. For the final night's Dinner Dance, cocktail attire is requested.

Golf course attire: Proper golf attire is required. No jeans or cut-off shorts. No metal spikes allowed.

## EASY PAYMENT OPTIONS

For your convenience, all registration and activity fees may be paid by check, wire transfer, Visa, MasterCard, or American Express. If paying by check, please make sure it is in U.S. currency and mail it to the International Association of Defense Counsel, 303 West Madison, Suite 925, Chicago, IL 60606. If paying by wire transfer, please contact Jenée Williams at [jwilliams@iadclaw.org](mailto:jwilliams@iadclaw.org) for wire transfer details.

## IADC CANCELLATION POLICY

A CASH REFUND, less a \$150 processing fee, will be made if a written notice of cancellation is received by the IADC office more than thirty (30) days prior to the first day of the meeting. No reason for the cancellation need be provided for a timely notice of cancellation.

NO CASH REFUND will be made if notice of cancellation is received by the IADC office thirty (30) days or less prior to the first day of the meeting. However, if special circumstances arise before the meeting which prevents attendance, a member may request a future meeting credit. The request needs to be in writing and submitted to the IADC office. It should be directed to the Finance Committee's attention and note the special circumstances which caused the cancellation. The credit request can only apply to meeting registration fees (not air, hotel, activity, tour, or special event fees) and, if approved, will be valid for use toward any IADC meeting for one (1) year from the date of the meeting for which credit is requested. A \$150 processing fee will be deducted from the total future meeting credit.

All future meeting credit requests will be considered by the Finance Committee and the decision of that Committee will be final.





**DATE:** February 20 - 25, 2016 • **LOCATION:** The Inn at Spanish Bay, Pebble Beach, California USA

*You must register for the meeting with the IADC prior to reserving rooms at the hotel. You will receive a link to the hotel's reservation website that will allow you to reserve a room at the resort. Register for the meeting at [www.iadclaw.org](http://www.iadclaw.org) or fill out this form and mail or fax to the IADC, or email Maria Juarez at [mjuarez@iadclaw.org](mailto:mjuarez@iadclaw.org).*

### Registrant Information

NAME		NAME ON BADGE	
FIRM/COMPANY NAME			
BUSINESS ADDRESS			
CITY	STATE	ZIP	COUNTRY
BUSINESS PHONE		BUSINESS FAX	
EMAIL ADDRESS		SPOUSE/SIGNIFICANT OTHER EMAIL ADDRESS	
HOME ADDRESS	CITY	STATE	ZIP
U.S. STATE BAR NUMBER(S) FOR ALL STATES WHERE LICENSED		U.K. SOLICITOR IDENTIFIER NUMBER (if applicable)	

Please indicate if the following will be attending with you: ☐ Spouse/Significant Other/Adult Guest

If a spouse/significant other/adult guest will be attending, please indicate the name for the badge: \_\_\_\_\_

Is this the first IADC Annual or Midyear Meeting that you have attended as a member? Yes ☐ No ☐

\*If yes, please forward a photo of you and your spouse/significant other (if attending the meeting) to [afitzgerald@iadclaw.org](mailto:afitzgerald@iadclaw.org).

Check this box if you are interested in being a First Timer Host. ☐

### Meeting Information and Fees


**Member and Emeritus Member, Spouse/Significant Other/Adult Guest:** Fee includes the breakfasts, Welcome Reception, Theme Party, Dinner Dance, some receptions, Committee and CLE meetings, and meeting materials.

**Two-Day Corporate Counsel and Insurance Executive Package** (for corporate counsel and insurance executives **ONLY**): Fee includes Committee Meetings, CLE programs, breakfasts and any events for general attendees on any two consecutive days of your choosing.

**\*\*\*\*\*Spouses/Adult Guests who would like to receive CLE credit must register as a Non-Member Lawyer.\*\*\*\*\***

Code	Registration Category	Before December 18	After December 18
R1	Member/Non-Member Lawyer	\$1,445	\$1,495
R2	Spouse/Significant Other/Adult Guest	\$595	\$645
R7, R14, R15	Two-Day Corporate/Insurance Package Please indicate which two days you plan to attend the meeting: <input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday	\$495	\$520
R8	Two-Day Corporate/Insurance/Spouse/Sig. Other/Adult Guest	\$225	\$250
R9	Emeritus Member	\$650	\$700

**F1 The Foundation of the IADC Raffle Ticket** \_\_\_\_\_ x \$100 each \$ \_\_\_\_\_

 Our raffle package is courtesy of The Fairmont Southampton - Bermuda in Southampton, Bermuda, home of the 2016 IADC Annual Meeting. This raffle prize includes three nights accommodations for two people at The Fairmont Southampton - Bermuda, including one round of golf, with cart, for two people and one spa treatment per person. The drawing will be held at the Dinner Dance on February 24. You do not need to be present to win. Tickets can also be purchased at the meeting.

Total from activities on reverse \$ \_\_\_\_\_

Total payment included with registration from \$ \_\_\_\_\_

### Payment

Check/Money Order (Payable to the IADC in USD) ☐ AMEX ☐ Visa ☐ MasterCard

Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_ Security Code: \_\_\_\_\_

Name on Card: \_\_\_\_\_

Signature: \_\_\_\_\_

**Please note:** The IADC cannot register you unless the proper payment is made with your registration form. All fees are listed above and are payable in U.S. currency. If paying by wire transfer, please contact Jenée Williams at [jwilliams@iadclaw.org](mailto:jwilliams@iadclaw.org) for wire transfer details. Please see the General Information page for the full refund policy. Questions? Call 1.312.368.1494.

International Association of Defense Counsel • 303 W. Madison, Suite 925, Chicago, IL 60606 USA  
Phone: 1.312.368.1494 Fax: 1.312.368.1854 Web: [www.iadclaw.org](http://www.iadclaw.org)

**GOLF** (reservations requested by January 20, 2016)

Fees for the Ryder Cup Golf Tournament and Couples Event include green fees, carts, boxed lunch, bottled waters, prizes, and tournament costs. Rental fees will be charged to the individual.

Code	Date	Time	Event	Price/Person	Participants (Handicap)	Total \$
G1	Sun. 2/21	12:30 p.m.	Golf Tournament	\$340	( )	\$
G2	Mon. 2/22	12:30 p.m.	Couples Event	\$340	( )	\$

**TENNIS** (reservations requested by January 20, 2016)

Fees include court fees, refreshments, and balls. Tournament fees also include all related tournament costs and prizes. Rental fees will be charged to the individual. (A=Advanced; B=Intermediate)

Code	Date	Time	Event	Price/Person	Participants (A/B Team)	Total \$
T1	Sun. 2/21	1:30 p.m.	Tennis Mixer	\$35	( )	\$
T2	Mon. 2/22	1:30 p.m.	Tennis Mixer	\$35	( )	\$
T3	Tues. 2/23	1:00 p.m.	Tournament (Men's/Women's)	\$55	( )	\$

**ACTIVITIES** (reservations requested by January 20, 2016)

Code	Date	Time	Event	Price/Person	Participants	Total \$
A7	Sun. 2/21	10:00 a.m.	Cooking Class	\$420		\$
A6	Mon. 2/22	1:00 p.m.	Land Rover Driving	\$450		\$
A1	Mon. 2/22	1:00 p.m.	Monterey Bay Aquarium	\$140		\$
A2	Tues. 2/23	1:00 p.m.	Carmel Wine Tour	\$125		\$
A3	Tues. 2/23	4:00 p.m.	Wine and Jewelry Making	\$40		\$
A4	Tues. 2/23	5:00 p.m.	Int'l Comte. Wine Tasting	\$45		\$
A5	Wed. 2/24	1:00 p.m.	Tour of Big Sur	\$125		\$

Total (transfer to main registration page for payment) \$ \_\_\_\_\_

Add activities total to registration total on the reverse and send in to the IADC with payment, fax to 1.312.368.1854, or register online at [www.iadclaw.org](http://www.iadclaw.org).

### Cancellation Policy for Tours and Activities

In order to receive a full refund, cancellations of tours/special activities offered through the IADC must be received by the IADC office in writing by January 20, 2016. Cancellations after this date will not be refunded unless we are able to fill your spot.

Tours may fill prior to the January 20 deadline, so we encourage you to register early, if interested.



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## GENERAL CONVENTION COMMITTEE

### **Chairs**

Mark and Anne Beebe, *New Orleans, LA USA*

### **Book Review**

Bill and Mary DiSipio, *Philadelphia, PA USA*

### **Couples Golf**

Frank and Lorna Hirsch, *Raleigh-Durham, NC USA*

### **Dine Around**

Dominic Campodonico, *San Francisco, CA USA*

### **First Timers**

Mark and Stacie Hansen, *Peoria, IL USA*

### **Hospitality**

Warren and Katherine Butler, *Mobile, AL USA*

### **Morning Run**

Kendall and Jessica Harrison, *Madison, WI USA*

### **Morning Walk**

Asim and Cecille Desai, *Los Angeles, CA USA*

### **Ryder Cup Golf**

Tony Kang, *Seoul, Korea*

Daryl Dursum, *Houston, TX USA*

### **Second Timers**

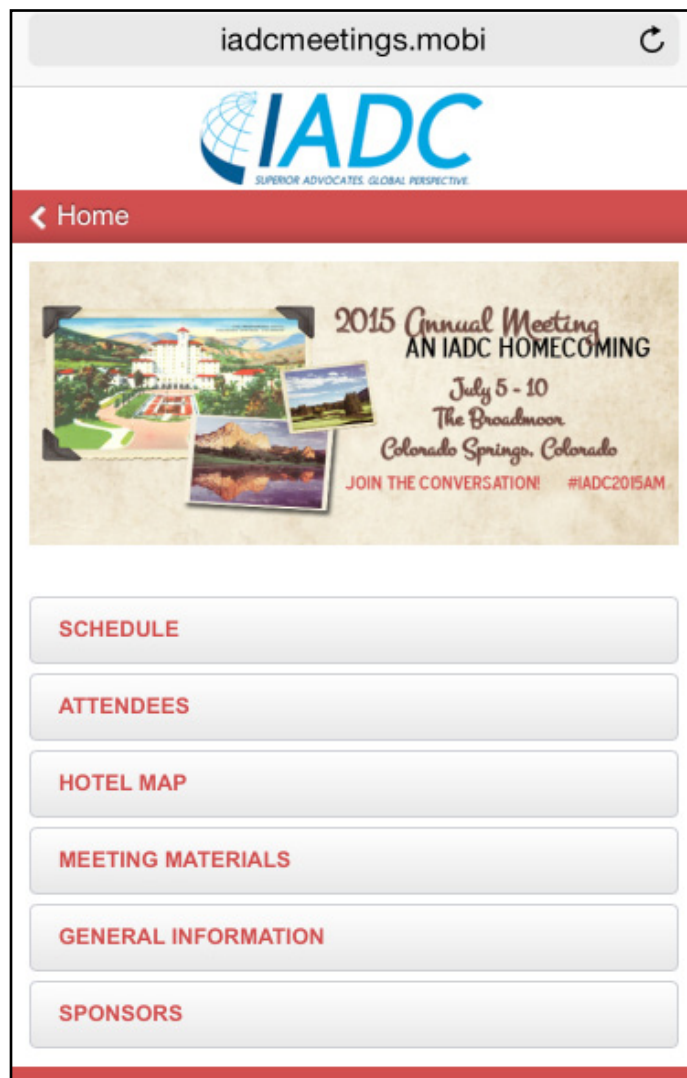
Andrew and Sheri Chamberlin, *Greensboro, NC USA*

### **Solo Initiatives**

Chip Magid, *Washington, DC USA*

### **Tennis**

Steve and Paulette Schwegman, *Saint Cloud, MN USA*



[www.iadcmeetings.mobi](http://www.iadcmeetings.mobi)

When you are onsite at the 2016 Midyear Meeting, we encourage you to use our meeting mobile website. You'll be able to find the conference schedule, attendee lists, meeting materials, and more. This is the perfect tool to use to stay connected while you are at the meeting. Visit [www.iadcmeetings.mobi](http://www.iadcmeetings.mobi) to access this meeting mobile site.



# SAVE THE DATE



## 2016 Annual Meeting

July 9 - 14

The Fairmont Southampton - Bermuda  
Southampton, Bermuda



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## UPCOMING EVENTS

April 28 - 29, 2016

Corporate Counsel College

The Ritz-Carlton  
Chicago, Illinois USA

May 12, 2016

Professional Liability Roundtable

University of Chicago  
Booth School of Business  
Chicago, Illinois USA

July 9 - 14, 2016

Annual Meeting

The Fairmont Southampton - Bermuda  
Southampton, Bermuda

July 30 - August 5, 2016

44th Annual Trial Academy

Stanford Law School  
Palo Alto, California USA

October 13 - 14, 2016

International Corporate Counsel College

Brussels, Belgium