ACEDS 3rd Annual E-Discovery Conference & Exhibition

aceds
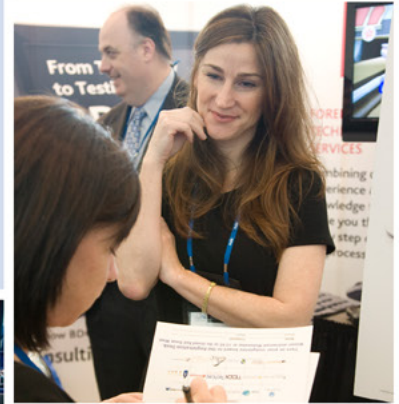Association of Certified E-Discovery Specialists

Feb 28–Mar 2, 2013 | Westin Diplomat | Hollywood, FL

The Conference for E-Discovery Professionals

Top solutions providers give hands-on demos

Up to 14 CLE, CPE, and CEDS Credits, including ethics

More than 25 experts on 13 panels show you how to reduce costs, risks

Predictive coding workshop probes best practices, workflows

Visit Ediscovery Conference.com to register and receive updates

Question experts directly, get the answers you need

Presenting Sponsor

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FIRSTAdvantage   LITIGATION consulting

Practical Knowledge and Career Enrichment Everywhere You Turn

You Are the Star of Our Conference

We strive mightily to make it enriching and rewarding for you, always thinking of how we can increase your success in your job through practical, useful information in each panel. The many great testimonials we get from our attendees from all sectors – some of which you'll see here – make us confident that we succeed in meeting those goals year after year!

This is the conference everyone talks about. We bring top experts to share best practices and teach you how to deal effectively with major challenges in e-discovery – in the private and public sectors.

You Ask Questions in Our Format

Our lively format where you get to question the experts directly is one reason our conferences are so popular. Expert moderators also question the panelists and make sure they give helpful guidance. Our attendees say they learn much more this way.

E-discovery is a global challenge arising from burgeoning data of all types and conflicting laws and rules at all levels of government. The ACEDS conference seeks to help you resolve these dilemmas and do your job better.

What You Can Count On at the ACEDS Conference

- We do everything possible to foster learning and enrichment
- We attract top speakers from a variety of fields
- We present a program of timely panels with actionable knowledge
- We provide learning materials and a conference book with resources gathered by ACEDS editors
- We offer career-enhancing networking, including unforgettable beachside events, where you can meet leaders in the field
- We worry about the little things to make this an unforgettable experience

The overwhelming endorsement and praise our attendees, sponsors and exhibitors give us is the best, and our proudest, evidence we succeed in meeting your needs.

The Global Challenge of E-Discovery

E-discovery and the management of electronically stored information (ESI) is one of the great challenges in commerce and law today. The proper and efficient handling of ESI is now an essential skill for persons in legal, commercial, governmental and institutional circles.

The Promises and Risks of Advanced Technologies

A crop of new technologies have emerged to tackle these challenges, but they are not without accompanying risks and steep learning curves. Technology-assisted e-discovery solutions have been shown to reduce the time and costs associated with document review and other tasks. At the ACEDS conference, the service providers behind these tools will showcase their products in hands-on demonstration sessions. They will simulate real-world litigation scenarios with authentic data sets so that you can decide the quality of the tools for your yourself.

ACEDS exists to build a community and bridges around the globe to assist persons in learning and perfecting the skills necessary to accurately gather, store, manage and produce ESI in business and legal affairs. The proper management of ESI is a global concern that can be attained with best practices and technology.

Other e-discovery difficulties have arisen recently, from attorney malpractice to conflicting global data laws and proliferating "big data." The ACEDS conference seeks to help you do things right and resolve these dilemmas. Experts give you essential knowledge, tools and resources to help you mitigate risks and take advantage of the opportunities this quickly changing environment presents.

"This is THE conference to attend for my profession."
Lisa Ream,
Ream Litigation Services,
Mount Washington, KY

"The information provided is extremely eye-opening and very useful."
Stacie Tepper,
Carnival Corporation, Miami

"This is a flagship conference on the cutting edge issues in e-discovery."
Victoria Brieant,
Stroock & Stroock & Lavan, Miami

Who Should Attend

Arbitrators
Chief Counsel and staff in
　government agencies
Chief Information Officers
Chief Records Officers
Chief Technology Officers
Clerks of Court – Federal and
　state
Compliance officers
Computer forensics specialists
Consultants
Contract attorneys
Data protection professionals
Document review specialists
E-discovery:
　- Attorneys
　- Directors
　- Specialists
　- Technologists
Prosecutors – Federal and state
General Counsel and staff at:
　- Companies and businesses
　- Educational institutions
　- Non-profit organizations
Human resources managers
Imaging services specialists
Information services directors
Information technology
　managers
Inspectors General
Information technology
　professionals
Insurance underwriters
Judicial law clerks and
　assistants

Judges – Federal and state
Knowledge officers
Law firm administrators
Litigation practice support
　managers
Litigation project managers
Litigation support:
　- Specialists
　- Analysts
　- Technologists
Legal technology specialists
Litigators
Malpractice insurance risk
　administrators
Mediators
Paralegals
Practice support managers and
　staff
Privacy officers and
　professionals
Project managers
Records managers
Risk managers and officers
Software providers
Special Agents and investigators
Special Masters, Referees and
　Neutrals
Staff attorneys in:
　- Law firms
　- Companies and other
　organizations
　- Government agencies
Technologists
Technology project managers
Training managers

Some Things You'll Learn

- How to use and choose the computer-assisted review tool that is right for your case

- How to prevent malpractice, protect your career and preserve your reputation

- Best ways to harness the cloud, reap its rewards and rein in risks

- How to control costs with sound project management

- How to leverage social media to increase business, while avoiding its risks

- Lessons from high-profile cases involving heated e-discovery disputes

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Members of ACEDS receive many exclusive benefits, including:

1.　Original news and analysis on important events, cases, and trends

2.　Resources – court documents, white papers, legislation and other vital items

3.　Web seminars on crucial US and worldwide hot button topics

4.　Exclusive career tools, including job postings, podcasts with experts, and best practices videos

5.　Discounts on CEDS certification, the ACEDS conference, other ACEDS services

Who We Are

The Association of Certified E-Discovery Specialists (ACEDS) is the member organization for private and public sector professionals who work in e-discovery and related fields in all countries. It offers them a community for the exchange of ideas, best practices and solutions to common challenges.

ACEDS also provides members essential tools for developing and maintaining competency in e-discovery. It offers its worldwide membership the highest quality certification, the Certified E-Discovery Specialist (CEDS) designation, as well as independent, timely news, abundant resources, insightful analysis, practical training and invaluable live and virtual networking. ACEDS and its professional staff are based in Miami. It is guided by a stellar, diverse Advisory Board.

ACEDS management has 23 years of experience in delivering objective, independent and straightforward editorial content, high quality training and education, world-acclaimed conferences and, since 2001, professional certification programs that set world standards and meet the highest levels of competency assessment, professionalism and integrity.

They developed the world-acclaimed Certified Anti-Money Laundering Specialist (CAMS) designation, which is held by thousands of corporate, government, legal, regulatory, law enforcement and consulting and technology professionals in 140 countries, primarily the United States.

ACEDS is building a community of specialists around the world who are distinguished by the Certified E-Discovery Specialist (CEDS) certification and a strong desire to learn best practices.

ACEDS Believes Networking is Vital

At ACEDS, we know expert knowledge and skill are not all you need to succeed. Networking and career connections are also vital. We give you opportunities to meet counterparts, experts and industry leaders at our conference, website and seminars. The conference speakers and your fellow attendees are anxious to share their experience and knowledge with you.

ACEDS News, Analysis and Resources

ACEDS.org seeks to build an online consortium for thought leadership and best practices for professionals in the fields of e-discovery and law, data management, and technology. It publishes legal articles, news and white papers through the efforts of its in-house editorial team and contributions from its more than 1,000 members worldwide. Bits + bytes, its weekly newsletter, is read by 8,000 subscribers across five continents.

ACEDS editors post documents, pleadings, court rulings and other resources on a multitude of issues. These resources help members do their jobs better. They are alerted to coming issues, such as the new malpractice threat, developments in predictive coding case law, Congressional interest in e-discovery, the challenges big data poses to organizations of all types, and the emerging e-discovery angles in high-profile litigation and investigations.

Training

Training Events ACEDS offers a variety of virtual and live training events led by experts.

- Web seminars – We bring you monthly web seminars on hot topics and best practices, lessons from the frontlines and effective strategies and techniques.
- Live seminars – We bring live expert instruction on crucial subjects to major cities.
- Online, On-Demand Training – Coming in early 2013, we will offer downloadable curriculum training on crucial areas of e-discovery practice and policies.

Learning With Networking and Community

Podcasts – ACEDS interviews experts and newsmakers on topics in e-discovery and related fields.

Live Chats – Members-only get free access to live chats in which experts share guidance, tips and answer questions on key issues and challenges in the field.

Career Center – ACEDS.org offers the worldwide e-discovery community a platform to explore job ads and other opportunities.

Task Forces – ACEDS Task Forces let members shape training and website content, formulate activities in different locations, start chapters in certain cities, explore e-discovery needs in arbitration, the criminal law and other areas. Select a Task Force, get active and expand your horizons!

CEDS Certification

ACEDS offers the Certified E-Discovery Specialist (CEDS) credential, which is now held by diverse professionals around the world.

Candidates for CEDS certification must meet eligibility requirements specified in the CEDS Candidate Handbook, which is downloadable free at ACEDS. org/CEDS, and pass a rigorous examination. The exam is offered at 600 authorized testing centers worldwide, including 320 in the US and 35 in Canada.

CEDS certification validates e-discovery skill and knowledge. It acknowledges that persons who are CEDS can navigate the e-discovery process effectively and meet uniform principles of competence. Developed according to rigorous psychometric standards, the CEDS certification sets standards of excellence in e-discovery.

Upon completing the certification application, candidates get the CEDS Exam Preparation Manual at no extra cost. The Manual covers the areas in the examination.

The certification fee, which includes the Manual and exam, is $795 for ACEDS members, $995 for non-members and $595 for government employees. The ACEDS annual membership fee is $195 and $150 for government. To register for CEDS certification, contact memberservices@aceds.org, call 786-517-2721 or visit aceds.org/CEDS.

CERTIFIED E-DISCOVERY SPECIALIST
CEDS

FIND IT FASTER

The Experts You Will Hear and Meet

John Barkett

Past chair of the ABA's National Institute on E-Discovery and a member of the Advisory Committee on Civil Rules, he is a partner in the Miami office of Shook, Hardy & Bacon LLP. A specialist in litigation and commercial arbitration in several areas of law, he is an adjunct professor on e-discovery at the University of Miami School of Law and fellow of the American College of Environmental Lawyers. He is also a member of the ABA Section of Litigation Council, and former co-chair of the Section's Environmental Litigation Committee. A committee member of the Seventh Circuit Pilot Project on E-Discovery, he has served or is serving as a neutral in more than 50 matters in the aggregate of $400 million. A prolific writer, he authored the books, E-Discovery: Twenty Questions and Answers (2008) and The Ethics of E-Discovery, and several articles on e-discovery, including "Walking the Plank, Looking Over Your Shoulder, Fearing Sharks Are in the Water: E-Discovery in Federal Litigation?"

Steven Baron

Vice President of Robert Half Legal E-Discovery Services for North American operations, he works closely with law firms and corporate legal departments to provide complex solutions to suit discovery needs. With 11 years of litigation support experience, he advises litigators and general counsel on discovery strategies. His areas of expertise include managed review, e-discovery advertisement, US Justice Department investigations, class actions and others. Previously, he served as Director of Sales for Document Technologies Incorporated, where he promoted a full suite of litigation support solutions with a primary focus on forensic collection and analysis, ESI processing, and various hosted review platforms.

Julie Brown

Litigation Technology Executive Manager at Vorys, she has worked in legal technology for more than 20 years at law firms and in-house legal departments. She has managed large-scale e-discovery and document productions, and excels in records management, litigation technology training and development of litigation technology databases. She oversees the litigation technology department at Vorys, which provides a full range of e-discovery services. A member of Sedona, she also serves on the Electronic Discovery Reference Model advisory committee and is active in coordinating education opportunities at the International Legal Technology Association. In 2011, she received ILTA's Distinguished Peer Award for Litigation and Practice Support, and serves on the association's Litigation Support Steering Committee as well.
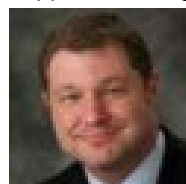
Sean Byrne, CEDS

Managing attorney at Byrne Law, in Chicago, he has served as a litigator and e-discovery consultant for more than 14 years, advising corporations and law firms on litigation readiness, legal hold implementation, litigation support department operations and optimization, and the preservation, analysis and review of ESI. Previously, he worked as a trial attorney, corporate counsel, and with the Forensic and Litigation Technologies groups of two of the world's largest global consultancies. He is a member of the Seventh Circuit Electronic Discovery Pilot Program, where he serves as co-chair of its Technology Sub-Committee. He was one of the first attorneys to earn the CEDS designation.

James Bickley, CEDS

Managing Partner of Electronic Discovery Consulting at Counselor Resource Group, in Washington, DC, he also leads the firm's business development efforts, including creation of new market partnerships. His expertise lies in ESI lifecycle management, which refers to processes involved in e-discovery tasks, and in creating collection strategies and filtering techniques that limit the scope and volume of data. He has consulted numerous corporate and law firm clients in IP, antitrust, securities and professional liability cases and regulatory matters. His antitrust work often involves price fixing matters before the Department of Justice; in securities work his services focus on improper financial information reporting that resulted in stockholder suits; in regulatory matters, his work involves lawsuit stemming from improper accounting techniques that influenced stock prices for public companies. Previously, he worked with a Electronic Discovery technology firm advising clients on ESI matters, such as advanced concept search technology and document review applications.
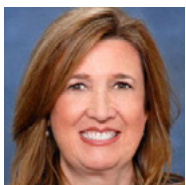
Donna Chesteen

A founding member of The Tech Law Firm, in Orlando, she is a Florida attorney with an extensive background in software development. She has more than two decades of experience mastering advanced technologies, and previously worked as a technical leader at Symantec. Earning her master's degree in computer science and an MBA, she excels in facilitating legally defensible, cost-effective technology solutions. An expert in all phases of the EDRM, she advises clients on legal issues pertaining to the development, distribution, and licensing of software and intellectual property issues. She is slated to serve on the steering board for the Orange County Bar Association technology committee. As a software engineer, she was a technical leader in the development of products that varied from search-and-rescue software for the US Naval Oceanographic Office to ambulatory heart monitor software. She has an in-depth knowledge of complex ESI and excels at implementing document retention policies and other electronic document management concepts.

Julie J. Colgan

An Information Lifecycle Governance Expert at IBM and President Elect of ARMA International, she provides subject matter expertise to clients seeking to improve

their information economics and governance posture through implementation of information governance technologies. A Certified Records Manager, she assists clients at large corporations and law firms with development of information governance policies, record retention requirements and program implementation strategies. Previously, she served as director of records and information management for Nexsen Pruet, a South Carolina law firm, and as manager of records services for Arnall Golden Gregory, an Atlanta law firm. In both positions, she focused on strategic development and tactical implementation of information governance programs, and on integrating those programs into the overall strategic objectives of the law firm. She has been a board member on the ARMA International Board of Directors since 2010. Here she chairs the Generally Accepted Recordkeeping Practices (The Principles) Steering Task Force.

Bill Gallivan, CEDS

Founding member and managing executive of Gallivan, Gallivan, & O'Melia, in Seattle, he focuses on business development, market economics and company growth. Specializing in scope reductions, cost shifting and third party fee sharing for large or unwieldy productions, he has spent more than 20 years in the fields of computer forensics, managed security, system hardening and legal information services. Previously, he was Vice President of Professional Services at Attenex, a litigation support technology firm formerly owned by Preston Gates and Ellis. He also worked for AT&T Easylink in Hong Kong, Equant in London, BBN Technologies in Boston, and most recently, for a variety of commercial and government agencies including LEXIS/NEXIS, the NSF, NASA, the Ohio Supercomputer Center, and the US Air Force. He excels in commercial planning and the sensible and profitable integration of technology into customer business models.

Stephanie Giammarco, CEDS

A partner at BDO Consulting, she leads the Computer Forensics and E-Discovery practice. For 20 years, she has provided litigation and investigative services to a wide range of Fortune 500 clients and law firms. A Certified Public Accountant and Certified Fraud Examiner, she is a consults clients in class actions, internal investigations, and securities and financial statement fraud. Using tools of computer forensics, e-discovery, data mining and electronic extraction, she has led some of the largest complex financial fraud cases to date. She testifies on behalf of businesses concerning e-discovery practices, and often speaks and presents papers on e-discovery and computer forensics topics.

Alon Israely

Co-founder and leader of the Strategic Partner Program at Business Intelligence Associates, in New York, he works with clients to integrate BIA's cloud software product, Total Discovery. A lawyer with more than 15 years of experience developing advanced computing technologies, he has consulted with corporations and their law firms on a variety of technology issues, including expert witness services related to computer forensics, digital evidence management and information security. Previously, he was a senior member of several IT teams working on projects for Fortune 500 companies related to global network architecture and data migration projects for enterprise information systems. A pioneer in the field of digital evidence collection and handling, he has worked on several notable financial fraud cases, large-scale multi-party international lawsuits and corporate matters involving the SEC, FTC, and international regulatory boards.
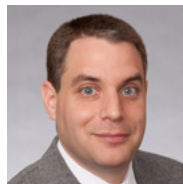
Jeffrey S. Jacobson, CEDS

A litigation partner at Debevoise & Plimpton LLP in New York, he focuses his practice on the defense of consumer and securities class actions and the electronic discovery challenges presented by complex litigation and investigative matters in these and other types of legal matters. Recommended by The Legal 500 US (2011) for Securities Litigation and Data Protection and Privacy and recognized as a Securities Litigation "Star" in the IFLR Benchmark Litigation Guide (2010), he is a frequent author on class action defense and e-discovery strategies for various legal publications, including Bloomberg Class Action Litigation Reporter. Among his recent litigation projects, he designed and implemented electronic discovery strategies for complex U.S.-based and international investigations, including the global internal investigation of Siemens AG, and conducted internal investigations for companies following the threat or imposition of e-discovery and other sanctions.

Alvin Lindsay, CEDS

Partner at Hogan Lovells, in Miami, and Chairman of the ACEDS Advisory Board, for two decades he has litigated on behalf of international corporate and business clients complex cases in federal and state courts and international tribunals of arbitration. A leader in the field of e-discovery, he has been at the forefront of some of the most significant product liability cases in recent times, including those involving commercial airline disasters, drywall from China, pharmaceutical products, vaccines, tobacco, medical devices, cosmetics, yachts, automobiles, and consumer goods. He is co-chair of the firm's Electronic Information Group and is often quoted in the major media on matters dealing with technology and litigation, and the Federal Rules of Civil Procedure as they bear on electronic evidence.

Bruce Malter, CEDS

Solutions Group Leader for the Litigation Solutions Practice at Project Leadership Associates, in Chicago, he advises corporate legal and law firm attorneys on e-discovery matters, including litigation preparedness, e-discovery case management, computer forensics, and litigation department operations. He has more than two decades of experience with professional services companies and technology providers with an extensive focus in the litigation support sector. He is also an expert in project management, operations management, and business development. He has worked in the Pacific Rim for several years with a former technology and service provisioning company.

Helen Bergman Moure, CEDS

Principal of Lex Aperta, Seattle, which specializes in e-discovery legal advice and consulting, she is a commercial litigator in all courts. Since 1999, she has devoted her practice to efficient, cost-effective e-discovery and document review services to clients ranging from entrepreneurs to Fortune 100 corporations. Previously a partner at K&L Gates, she helped found the firm's e-Discovery Analysis and Technology (e-DAT) Group and develop Patterns document review software by Attenex. She is experienced in structuring projects involving all aspects of discovery, from custodian identification and retention to collection, processing, review, and post-production litigation support. She advises public and private organizations on litigation readiness and designing and implementing document retention systems. A frequent speaker on e-discovery, she is a member of the Florida Bar and Washington Bar.

Paul Neale

As CEO of DOAR Litigation Consulting, in New York, he advises clients involved in major litigation matters, including those responding to government enforcement actions and defending white collar criminal prosecutions. He is one of the nation's leading, testifying experts on electronically stored information issues such as spoliation, proportionality, sanctions and the use of alternative technologies such as predictive coding software. He provides trial strategy consulting in the form of jury research, witness testing and trial presentation as well as advisory services relating to the analysis, management and production of ESI. Through his leadership of DOAR, he has been involved in criminal cases alleging financial crimes such as insider trading, bid rigging, accounting fraud, securities fraud and FCPA violations.
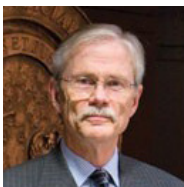
Judge Richard Nielsen

Circuit court judge in Hillsborough County, he is the incoming chair of the Florida Bar Civil Rules Committee. He is assigned to the domestic relations and family law division of the Thirteenth Judicial Circuit. An appointee of former Governor Jeb Bush, he was previously assigned to the Complex Business Litigation Division. He co-chaired the Thirteenth Judicial Circuit Professionalism Committee from 2008 to 2012, and serves on the Technology and Professional Courtesy committees of the Hillsborough County Bar Association. A participant in the Florida College Advanced Judicial Studies and the Florida Conference of Circuit Court Judges, he is a former trial lawyer admitted to practice to the US Supreme Court.

Daniel Pelc

A principal with Verizon's E-Discovery Solutions Team at Verizon Business Solutions, in Minneapolis, he is an attorney who focuses exclusively on e-discovery law and technology in the US and abroad. He blends legal, technical and business experience to provide comprehensive strategies and technical plans to Fortune 500 corporations facing information governance and e-discovery challenges. His clients include prominent pharmaceutical, energy and technology manufacturers

preparing for and litigating multijurisdictional cases in intellectual property, products liability and securities law. A frequent author on e-discovery topics, his articles have been featured in the ABA Journal, American Corporate Counsel Association Docket, Chicago Lawyer and ILTA's Peer to Peer periodicals.

Eric Robinson

A Kroll Ontrack Solutions Architect, in Richmond, he works with clients to develop and implement cost-effective, efficient, defensible discovery strategies. With more than two decades of legal, e-discovery and project management experience, he is an expert on current trends and technology associated with information management for litigation, investigations and regulatory matters. Along with managing the technical and operational aspects of litigation projects, he advises clients on all facets of the document review process, including staffing, set up and management. Previously, he worked as a Kroll case consultant, where he managed a number of high-profile, highly complex projects from inception to closure. His performance in this role garnered a Project Manager of the Year accolade from Kroll in 2009.

Barry Schwartz, CEDS

Vice President of BIA Advisory Services, in New York, he has more than 33 years of legal and business consulting management experience, including practical expertise with FDA matters and extensive knowledge of the medical device and industrial industries. He guides client projects at a high level, working with senior members of the client's internal and external teams to achieve project goals. As part of the larger BIA Advisory division, he assists clients in a wide variety of Information Management practice areas including litigation and discovery, document retention and management, regulatory compliance, and IT security. Previously, he was Senior Staff Attorney at Spriggs & Hollingsworth, Vice President and Business Manager of B-Street Media Corp., Senior Consultant at AdamsGrayson Corp., COO of Strategic Business Consultant, President of Contemporary Products, Inc., and Executive Vice President of Revere Products Corporation. He excels in discovery and document review matters.

Kimarie Stratos

Senior Vice President and General Counsel for Memorial Healthcare System, the fifth largest public hospital system in the United States, she oversees legal and risk issues at five hospitals, numerous primary care and outpatients centers and a nursing home. Previously, she was Senior Vice President and General Counsel at Miami Children's Hospital. An experienced litigator in state and federal court on behalf of corporate and individual clients in commercial matters, tort claims, and employment discrimination litigation, she is a member of the American Health Lawyers Association with 20 years experience in health law. A member of the University of Florida Hall of Fame where she received her law degree, she is also an expert in sports law and was the first female attorney registered as a major league baseball agent, representing athletes and sports corporations in multi-million dollar deals. She is one of the authors of a leading sports law textbook, The Law of

Professional and Amateur Sports.

Nancy Stuparich

Risk Manager at Florida Lawyers Mutual Insurance Company, she advises clients on how to prevent losses and reduce the risks arising from professional liability. She specializes in making malpractice insurance accessible and affordable to lawyers who routinely deal with electronically stored information. Prior to joining FLMIC, she practiced law in Florida for 20 years, providing counsel to both public and private entities, as well as individuals. She was the DeSoto County Attorney, an Escambia County Assistant Attorney, and assistant General Counsel for the Florida League of Cities, the Second District Court of Appeal and the 10th Judicial Circuit. She has worked for Attorneys Title Insurance Fund and Lawyers Title Insurance Corporation, as well as private law boutiques. Holding master's degrees in public administration and planning, and a post-graduate degree in International Taxation, she earned her JD from the University of Florida.

Jon Talotta

Partner at Hogan Lovells, in Northern Virginia, he chairs the international firm's global Electronic Information Group. He represents a wide and diverse array of US and international companies and organizations in federal and state cases in trial and on appeal, as well as in international arbitration. His work involves disputes surrounding contracts, insurance, intellectual property, trade secrets, technology, real estate, finance, securities and corporate governance. A member of various professional organizations and think tanks that focus on electronic discovery issues and best practices, including the Virginia Bar Association's Civil Litigation Council, he advises clients on e-discovery and records management procedures and policies. He is a frequent speaker and author on various issues relating to information risks, including e-discovery, cross-border transfers, litigation preparedness, privacy, data security, disaster recovery, social media, domain names and the Internet.

Robin Thompson

Manager of client relations at Business Intelligence Associates (BIA), in New York, she has worked in the legal field since 1974 as a discovery project manager in complex cases at the local and national levels. National President of the Association of Legal Support Professionals, she has a strong record of promoting and educating the e-discovery community, and has been active in various associations in the legal field, including ARMA and Women in E-Discovery. During her tenure as National President of ALSP, membership has grown by 45 percent, according to a 2011 survey by Litigation Support Today. She has received numerous awards, including ARMA's Award of Achievement, Ambassador Award and Spirit of Education Award. A frequent speaker on various issues in the legal field, she received a US Department of Justice Mentor Award. She is also a member of several Sedona Conference Working Groups.

Matthew Verga

Director of Consulting for Driven Inc., he counsels clients on issues throughout the discovery lifecycle and advises Driven on the development and refinement of its technologies and services. He has written and spoken extensively on discovery issues, including publishing an article in the Journal of Legal Technology Risk Management, moderating a panel at LegalTech New York, and speaking at the ACEDS Annual Conference. Previously, he spent four years as an Associate specializing in e-discovery matters at an AmLaw 100 firm counseling Fortune 100 and 500 clients on document management, preservation, collection, processing, review, production, and related discovery issues.

Charles Volkert

Executive Director of Robert Half Legal, one of the largest providers of project and full-time professionals to law firms, corporations and government agencies, he has been instrumental in the expansion of the company, which he joined in 1999. Robert Half Legal has locations in major US and Canadian metropolitan areas. A lawyer, he is an expert, author and speaker on employment trends, job search and career management and is co-managing director of Robert Half Legal eDiscovery Services which offers legal project management and e-discovery services, including litigation support, mergers and acquisitions matters and document review. He advises clients on the strategic use of project management and project attorney teams for e-discovery and document review, temporary legal support and full-time staff to manage business fluctuations and workload increases. He previously practiced law in Miami, focusing on complex litigation, insurance defense, medical malpractice and product liability.
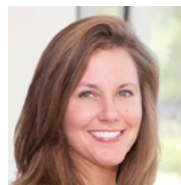
Allison Walton

An eDiscovery Attorney at Symantec, she is responsible for consulting with corporate legal departments and outside counsel to develop efficient, scalable processes and cost-saving strategies for the archiving, collection, review and storage of email and other electronic data. She also educates organizations on the importance of implementing an end to end archiving solution across electronic discovery reference model (EDRM) to drive down costs, improve efficiency and minimize legal risk. Her professional experience spans across a wide spectrum of legal support businesses which arms her with the knowledge to develop comprehensive strategies and to understand the concerns corporations are facing with regard to ESI and its explosive and unorganized nature in relation to the FRCP. She is also an active member of the 7th Circuit Pilot e-Discovery Pilot Program.

Stephen Whetstone

Vice President and Leader of Pitney Bowes Document Management Services and Pitney Bowes Legal Solutions, in Boston, he advises leading corporations, law firms and government agencies on the handling of high-volume digital and hard copy data for litigation, compliance and

business purposes. Previously, he served as General Manager of Iron Mountain Legal Discovery, a leading cloud-based e-discovery technology and service provider. He was an equity partner and litigator at Testa Hurwitz, where he represented clients in securities class actions, government and internal investigations, patent and intellectual property matters, and other complex litigation with high data volumes. Before joining Testa, he was a litigator at Skadden, where he focused on document review and motion practice. He has written several papers on discovery and technology developments and best practices, which have appeared in the National Law Journal, Bloomberg Law, Legal Times, IP Litigator, Inside Counsel, Privacy Law Journal and other prominent publications.

David Yerich

As Director of eDiscovery, he oversees processes, protocols and tools utilized by UnitedHealth Group related to electronic discovery for regulatory and legal matters. Before joining UnitedHealth Group, he worked as the Electronic Discovery Consultant at Faegre & Benson, a Minneapolis law firm, and previously worked for ten years at Cargrill, where the focus of his work was on document and electronic records management, including a roll-out of a worldwide document management tool for Cargrill's legal department.

Conference Program

Wednesday, February 27, 2013

8:00 AM - 4:30 PM	Registration Hours
10:00 AM - 12:00 PM	CEDS Exam Preparation Seminar Part I
12:00 PM - 1:00 PM	Networking Lunch
1:00 PM - 2:30 PM	CEDS Exam Preparation Seminar Part II
2:30 PM - 3:00 PM	Networking Refreshment Break
3:00 PM - 4:30 PM	CEDS Exam Preparation Seminar Part III
4:30 PM - 6:00 PM	Cocktail Reception for CEDS and ACEDS Advisory Board

Thursday, February 28, 2013

7:30 AM - 5:00 PM	Registration Hours
8:00 AM - 9:00 AM	Knowledge Breakfasts (Courtesy of Fios, Driven)
9:00 AM - 9:20 AM	Opening Remarks

9:20 AM - 10:35 AM — General Session: Lessons and Best Practices from the First Generation Computer-Assisted Review Cases

Computer-assisted review, a method by which senior attorneys teach advanced software to automate e-discovery processes, has stolen the last 18 months of headlines. It is said to dramatically cut the cost of document review, and best standards of accuracy once thought to be invincible. But high profile test cases have garnered as much attention for their squabbling parties and contentious evidentiary hearings as their highly touted search protocols. Where did these promising strategies go wrong, and what can be gleaned from the successes and failures in these cases? How do you settle on a review method that is appropriate for your case, and get your adversary to cooperate? What kind of technical expertise does computer-assisted review demand? How do you choose from among the technology offerings saturating the market? Have the purported advancements in automated review rendered keyword-based searching and other traditional methods obsolete? Experts on this panel answer these questions and others to help you choose review methods that are safe, effective and winning.

10:35 AM - 11:15 AM Networking Refreshment Break - Exhibition Hall

11:15 AM - 12:30 PM — General Session: Avoiding E-Discovery Malpractice and Other Data Landmines — Protecting Your Reputation, Your Career and Your Client's Checkbook

The e-discovery landscape changed forever on June 1, 2011, and with it the dynamic between lawyers, clients and service providers. On that day, Los Angeles company J-M Manufacturing Co. sued respected international law firm McDermott Will & Emery in what is believed to be the first ever case of e-discovery attorney malpractice. One year later, J-M expanded the suit to include service providers Navigant and Stratify. The case signaled the arrival of a new and permanent danger arising from electronic data that all face. It has generated the lion's share of attention for the precedents it has set and repercussions it has wrought, but it is by no means an isolated incident. A lawsuit for malpractice is just one manifestation of the personal and professional risks e-discovery has spawned. With reputations and careers on the line, what can you do to protect yourself and your client from these new perils? How can you safely and efficiently delegate crucial responsibilities without putting your case at risk? What are best practices for supervising service providers and implementing new review technologies? Experts on this panel probe these crucial questions, giving you actionable knowledge and practical advice for safeguarding your career as new perils emerge and familiar risks linger.

12:30 PM - 1:45 PM Networking Luncheon

1:45 PM - 3:00 PM — Concurrent Sessions
Getting Serious About Cleaning House — Defensible Deletion Procedures That Tame Big Data and Cut Costs

For years, organizations of all types have embraced a "keep everything" strategy, stockpiling electronic data and with it risks. The falling cost of data storage combined with slashed budgets, soaring data volumes and types, and decentralized responsibility has only compounded the problem. Organizations of all types are paying the price for their hoarding. Responding to data requests from adversaries in litigation and regulators has never been so costly, time-consuming or dangerous for those who don't have their houses in order. But all hope is not lost if you're struggling to keep your head above the rising data tides. With a defensible deletion strategy, you can identify, categorize and manage all electronically stored information across multiple data repositories, and

confidently delete data that has no business, compliance or evidentiary value. Effective policies reduce storage costs, streamline e-discovery efforts, and boost your bottom line. What does a defensible document retention and deletion policy look like? How do you implement a defensible legal hold and ensure its execution? How do you measure the effectiveness of an archiving strategy? How do you appropriately delegate responsibilities between HR, legal and IT? And how do you know when data has reached the end of the information lifecycle? Here, top experts in records management, information governance, and corporate compliance teach you best practices for managing what you have, and safely purging what you no longer need.

General Session: Technologies Come and Go, Process Is Forever — Winning Strategies for Success in E-Discovery Project Management

Sure, most of the hot e-discovery conversations have something to do with predictive coding or the latest, greatest review platform. But regardless of the technology employed, the goal of any e-discovery effort is the same: increase efficiency and defensibility, decrease costs, and find responsive documents. Meeting these goals begins and ends with effective project management. The emergence of the "E-Discovery Project Manager" in recent years shows the importance of applying sound project management principles to litigation and investigations involving electronically stored information. The quality of the project manager's work determines the strength of the case and the size of the bill. It is a daunting responsibility, but success starts with knowing how to respond to the simple questions: who, what, when, where, why, how and how much. The right answers help establish best practices for implementing repeatable, measurable and winning processes. In this panel, leading e-discovery project managers and experts from top corporations tell you how to organize and execute even the most complex e-discovery projects.

3:00 PM - 3:40 PM	Networking Refreshment Break - Exhibition Hall

3:40 PM - 4:55 PM	**General Session: E-Discovery Knowledge Nirvana — Top Service Providers Share Best Practices Across the Data Landscape**

The great software and services offered by the many e-discovery solutions providers are made possible by the knowledge and guidance of the top experts the companies and firms employ. Many of these experts will attend the ACEDS conference with their companies. We make sure the experts not only meet you at our social events and Exhibition Hall, but also share their best practices and job tips with you. So, we have arranged a conference session where the experts participate in a "lightning e-discovery knowledge nirvana." In rotation, they will give you their best, most current practice tips for navigating e-discovery and managing data. These will not be product or services infomercials. They will be golden nuggets of advice the experts share with their companies in developing their products and services. You will leave with dozens of invaluable pointers from some of the leading minds in the field. This unique session will give you an invaluable potpourri of sound advice!

5:00 PM - 6:30 PM	Networking Reception

Friday, March 1, 2013

7:30 AM - 6:30 PM	Registration Hours
8:00 AM - 9:00 AM	Knowledge Breakfast Courtesy of CRG, A TransPerfect Company
9:00 AM - 10:15 AM	**General Session: Crossing Borders, But Not Boundaries — Navigating Other Nations' Privacy and Data Laws to Get the Evidence You Need**

When it comes to e-discovery, there is the United States and there is everyone else. Countries all over the world, from Canada to Singapore are adopting new rules and guidelines to deal with electronic evidence and its transfer abroad. But while the US legal system favors broad and liberal discovery, other countries have moved in the other direction – putting privacy concerns before litigation interests, and imposing strict limitations on the discovery, or disclosure, of personal data. As these differences emerge and solidify, the rapid expansion of multinational business, cloud computing and international litigation of all sorts is increasing the frequency and complexity of cross-border e-discovery. Are you and your organization prepared to navigate this thorny, tangled global landscape? How are data laws in North America, Latin America, and the Asian-Pacific developing, and what impact will they have on your case? How does the looming EU Privacy Directive change how you get data from Europe? Now more than ever, it is imperative for lawyers, clients, and organizations to understand how this international puzzle fits together. In this panel, experts give you best practices for maneuvering this fast shifting global landscape, and navigating conflicting laws.

10:15 AM - 10:55 AM	Networking Refreshment Break - Exhibition Hall

10:55 AM - 12:10 PM	**Concurrent Sessions**

'Let's Start at the Very Beginning… It's a Very Good Place to Start' – Employing Sound Records Management to Avoid E-Discovery Pitfalls

A successful response to e-discovery begins with effective information governance and sound records management practices. Some organizations run a tight ship when it comes to handling data all the way through the information lifecycle. Others are drowning in a current of data excess, years worth of liability-riddled emails,

and little in the way of data organization. What does your data look like? And what effect is it having on the cost, time, and defensibility of your e-discovery efforts? Data hygiene is paramount. In this panel, experts give you practical, achievable methods for creating, storing and disposing of your records. You will learn how to develop successful, defensible policies covering email, IT, social media and other cloud applications. And you will get best practices from leaders in the field on developing disaster recovery plans and managing litigation holds.

Ethical landmines of "service providers practicing law" and "lawyers practicing e-discovery"
The proliferation of electronic data in lawsuits and investigations of all types has changed the composition of the litigation team, and the jobs those persons perform. Tasks once executed solely by lawyers are being outsourced to e-discovery technology providers, legal staffing firms, and legal process outsourcers at a fraction of the cost. But recent advisory opinions by the Washington, DC Bar Association and the DC Court of Appeals have cautioned these service providers against performing legal work, and lawyers about inappropriately delegating responsibilities to persons not authorized to execute them. Advances in document review technologies, the emergence of the cloud as an e-discovery tool, and the rise of social media by attorneys have further muddled the ethical waters, and created new career and reputational risks. How are the dynamics between lawyers and service providers changing, and to what effect? What duty do lawyers have to supervise service providers? What leeway do they have to outsource tasks traditionally done by fellow attorneys? How can vendors effectively tout products and services without misleading consumers? What new ethical dilemmas have predictive coding and social media created? How do the ABA Model Rules tackle these technologies? On this panel, legal experts tell you how to safely, appropriately and lawfully handle electronic data in its many forms, and show you how to fulfill your duty to your profession and your client.

12:10 PM - 1:25 PM	Networking Luncheon

1:25 PM - 2:40 PM

Concurrent Sessions
Leveraging the Cloud to Trim Costs Safely, Increase Productivity and Weather E-Discovery
You use it all the time: to email colleagues, to purchase products online, and, increasingly, to store, manage and process electronic information created in the course of business. Organizations of all types, even those under the most legal and regulatory scrutiny, are leveraging the cloud to reduce the costs associated with electronically stored information, while increasing efficiency and workflow. Cloud computing affords inexpensive storage and an exciting collaborative environment. It allows for instant access to work files from anywhere in the world. But it can be a double-edged sword for organizations that do not account for the e-discovery challenges it presents. Which processes are ripe for moving to the cloud, and which should stay put? How do you ensure your cloud solution is secure and legally defensible? Where does cloud data reside, and how can you quickly access, collect and produce it? How do you implement an effective legal hold on data stored in the cloud? How can a sound records management policy account for cloud data? Here, leaders on these and other hot-button issues tell you how to use the cloud safely and efficiently to maximize your e-discovery and business needs.

What Florida's Bouts with New E-Discovery Rules Teach Lawyers and Corporations at Home and Abroad
On September 1, Florida's first ever rules for discovery of electronically stored information in civil courts took effect. They caused a sea change in the way the state's 63,000 attorneys practice, and have imposed novel burdens on the Florida court system, parties in litigation, visiting litigants, and the multitude of large and small businesses inhabiting the state. The rules have created some efficiencies in civil procedure, but they have also tested the infrastructure of county and circuit courts from Pensacola to Key West. Though Florida is not one of the first to join the e-discovery fray, its legal and corporate diversity, division of rural and metropolitan areas, and abundance of international businesses make it a melting pot that lawyers, rulemakers, and e-discovery professionals nationwide and at the federal level are eying closely. What new liabilities and opportunities have the rules created, and how can you learn from them? Where are lawyers, litigants and judges most vulnerable to the perils of electronic evidence? What tools and services do you need to excel at e-discovery as the volume of your client's data balloons? How can you navigate the rules to reduce costs? And how do you protect against e-discovery malpractice? On this panel, legal experts from across the state, including the attorneys who crafted the rules, will give you important lessons gleaned from this unsettled legal terrain.

2:40 PM - 3:20 PM	Networking Refreshment Break - Exhibition Hall

3:20 PM - 4:35 PM

General Session: What the E-Discovery Fiascos of the TD Bank-Greenberg Traurig Case Teach Retained and In-House Lawyers, Service Providers and IT Officers
In the end, the case of Coquina Investments v. TD Bank turned out to be as crucial for the e-discovery lessons it taught as the novel legal theories it proscribed. It was not until well after a jury held TD liable for "aiding and abetting fraud" that key electronic documents emerged, and all hell broke loose. What followed in the Miami courtroom of US district Judge Marcia G. Cooke can only be described as a defendant's worst nightmare. Coquina lawyers accused TD and its outside counsel at Greenberg Traurig of failing to produce critical data. Finger-pointing ensued. And days of post-trial hearings aired serious mistakes arising from poor planning, failed processes and communication breakdowns between lawyer, client and vendor. The fallout put careers on the line

and TD's chance at appeal on life support. How can you ensure that this costly fate doesn't befall you or your client? What are best practices for delegating roles and keeping clear lines of communication between in-house and outside attorneys, service providers, and IT personnel? When millions of documents are at issue, how do you make sure the crucial ones are produced in a timely manner and in the right format? And how do you prevent, as Judge Cooke put it, "too many cooks from spoiling the broth?" Here top e-discovery experts and lawyers give post-mortem prescriptions for helping you succeed in complex, high-stakes cases.

4:35 PM - 4:45 PM	Break
4:45 PM - 5:45 PM	**General Session: The Double-Edged Sword of Social Media — How to Boost Your Bottom Line While Avoiding New Risks** As Facebook hits one billion global users and Twitter approaches a half billion, it's safe to say that social media is here to stay. Some organizations and law firms have embraced it for the unique marketing and networking avenues it affords, and the business it can drive. Others pass on its benefits because of the clear reputational and legal risks it presents. Social media can open doors to engage stakeholders and potential clients, but it is hard to monitor and even tougher to incorporate into existing information governance frameworks. The stakes are high. When the threat of a lawsuit strikes, it is crucial to know who is saying what, where it is located, and how to preserve and collect it for litigation. How can you use social media to drive business success, while reigning in the dangers it presents? What does an effective employee social media policy look like, and how can you integrate it with compliance policies that are already in place? How do you govern social media in the cloud? What are the best ways to preserve, collect, and produce social media? And how do you decide which methods are best? In this panel, e-discovery and technology experts from top organizations and law firms show you how to use and regulate social media in a way that is safe, effective, and profitable.
5:45 PM - 7:00 PM	Networking Reception - Exhibition Hall

Saturday, March 2, 2013

7:30 AM - 10:30 AM	Registration Hours
9:00 AM - 10:30 AM	Attendee Appreciation Breakfast/$10,000 Raffle and Prize Giveaway - Exhibition Hall
10:30 AM - 11:45 AM	**General Session: Shining A Light Into The 'Black Box' – A Knowledge Workshop on Computer-Assisted Review** By now, you're familiar with the basic concept: Identify a small set of responsive documents and use those to train a system to find other similar documents in a larger universe. If only computer-assisted review was that simple. Its advocates say it is the present and future of search and document review, but to do it right can require some level of technical skill and mathematician's logic. Some day, computer-assisted review may be the "easy button" its most fervent backers describe. Until then, all should be equipped with essential tools and knowledge to help choose between alternative methods, efficiently identify responsive documents, and effectively measure results to cut time and reduce costs. When it comes to selecting technology and technique, are you still shooting in the dark? And when your case is on the line, are you confident your method will find the "smoking gun?" In this panel, top experts walk you through a computer-assisted review simulation, and answer hot-button questions that could save you millions. This workshop alone is worth the price of admission.

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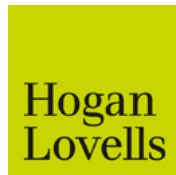
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In 1997, The Common Source was founded as one of the first companies to provide a secure, on-line repository specifically designed for use by litigation teams. To put our level of experience in perspective, our first clients had to access their data via a 56k dial-up modem. Over the years, the company upgraded to high-speed fiber connections, added a variety of litigation support services: electronic discovery, imaging, coding, contract attorneys/ paralegals for document review, microfilm/fiche conversion, forensics and robotic book scanner. The shining jewel in The Common Source's crown is its hosted review platform: Gabriel Docs™.   The search speed and useful features of Gabriel Docs™ are just a few of the reasons why clients continue to use it, case after case. In 2005, the company received its ISO 9001:2008 certification – validating that the quality processes that we profess to provide are in fact

followed – 100% of the time. We do not have a sales staff – our work comes from referrals and repeat business – we must be doing something right!

www.tdsllc.com

At Trusted Data Solutions we're the leading experts in backup tape restoration and data conversion: The trusted partners of choice for corporations, law firms and leading eDiscovery providers alike. TDS is comprised of a team of professionals with unparalleled experience and commitment to excellence. This team has been innovators in the field of backup tape related ediscovery and information management for over 20 years. TDS offers world class tape restoration, email processing, voice log and voicemail processing and legacy data conversion services to corporations world-wide. TDS's Electronic Discovery Group supports law firms, electronic discovery vendors and consultancies meet the difficult demands of fast-paced complex ediscovery events and investigations.
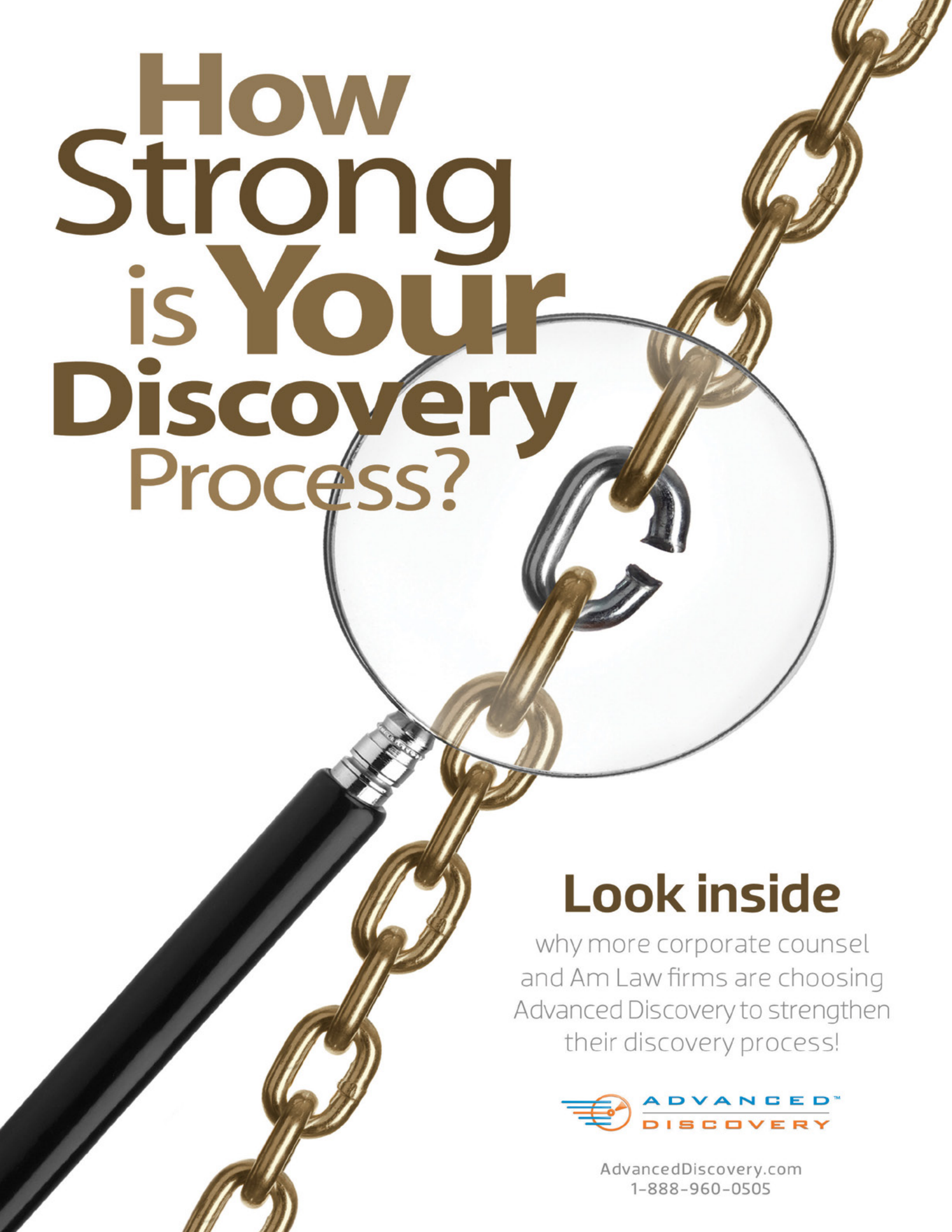

www.zevainc.com

Zeva is a technology-driven company delivering innovative software solutions and expert consulting to commercial and government customers. Zeva SecTool and DecryptNaBox provide solutions for bulk decryption/encryption of email messages for our Customers' collection and processing activities. Zeva products have been configured to solve email decryption challenges for corporate investigations, government investigative tasks, and litigation support. Zeva software products are written

to handle large quantities of email messages, making them an affordable and efficient alternative to other forensic and litigation support software. Zeva products can also assist organizations that have to deal with email retention. Zeva OutLocate offers the ability for users to classify email messages as they are received or sent, in accordance with company policy. Copies of these messages are stored in secure repositories, separate from user mailboxes and organized by their classification. Zeva software solutions and services can be a valuable addition to your eDiscovery technology portfolio.

Registration Information

Fees and Payment Policy
The registration fee for ACEDS members is $1,095. Non-ACEDS members pay $1,295. Government employees pay only $895. Early Bird prices apply during the months preceding the conference. Exclusive special conference pricing is also available for those who wish to attend the CEDS certification exam preparation seminar at the conference. The conference fee includes all networking sessions, including two breakfasts, luncheons, cocktail receptions, refreshment breaks, and the Conference Materials.

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Attire
Business casual attire is appropriate for all conference sessions and functions. Rooms may be cool, so a sweater or other covering is recommended.

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Please contact Member Services at memberservices@aceds.org or call 786-517-2701 or fax 786-316-0006 so we may accommodate your special needs, update your contact information, or answer your questions about the conference or CEDS certification.

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