

Event Title:

Paralegals' Guide to Complex Personal Injury Cases

Event Date and Time:

May 09, 2024 -- 02:00 PM EDT - 05:15 PM EDT

Event Agenda:

All times are shown in Eastern time.

- I. **Quick Tips for Troubleshooting Discovery Challenges**
2:00 - 2:30, Jennifer E. Davis
 - A. Managing a Flood of Incoming and Outgoing Documents
 - B. Copious Documents and Records
 - C. Discovery in Multi-Party and Complex Cases
- II. **Complex Medical Record Issues and Answers**
2:30 - 3:15, Paul Shalhoub
 - A. Voluminous Records
 - B. Obtaining and Organizing Records From Multiple Providers
 - C. Deciphering Intricate Terminology and Diagnostic Tests
 - D. HIPAA Issues and Answers
- III. **Practical Pointers for Coordinating With Experts**
3:30 - 4:00, Jennifer E. Davis
 - A. Managing Timelines and Deadlines and Preventing Delays
 - B. Coordinating Meetings, Interviews, Depositions, and Testimony
 - C. Challenges and Solutions in Working With Multiple Experts
- IV. **Minimizing ERISA Liens**
4:00 - 4:30, Jason D. Lazarus
- V. **Advanced Trial Preparation Insights**
4:30 - 5:15, Paul Shalhoub
 - A. Coordinating Schedules and Communications With Multiple Witnesses
 - B. Creating and Organizing Trial Exhibits, Witness Lists, and Binders for Complex Cases
 - C. Jury Selection Assistance Tips
 - D. Adapting to Last-Minute Changes and Challenges

Event Description:

Personal injury cases with voluminous documents, complicated medical issues, multiple parties, experts, and other issues can quickly make you feel overwhelmed. This guide will equip you with actionable techniques to keep your head above water as the work and challenges pile up. Discover effective methods for tackling complex case issues - register today!

- Get tips for staying on top of the flood of incoming and outgoing discovery.
- Keep medical records organized even when dealing with voluminous records and multiple providers.
- Learn practical hints for coordinating with multiple experts.

- Receive pointers for reducing and resolving ERISA liens.
- Uncover real-world insights for preparing for complex and high-stakes trials.

Who Should Attend:

This **advanced level course** is designed to give paralegals the knowledge they need to be an asset during complex personal injury cases. Those who should attend include:

- Paralegals
- Legal Technicians
- Legal Assistants
- Legal Support Staff

Event Bio:

Jennifer E. Davis is a partner with the law firm of Garan Lucow Miller, P.C., where she practices in the areas of appellate practice, auto negligence, commercial trucking negligence, construction defect, construction negligence, contract disputes, general liability litigation, insurance bad faith, insurance coverage disputes, personal injury, premises liability, and products liability. Ms. Davis is also a registered civil mediator. She is a former law clerk of the Indiana Court of Appeals, Judge Paul D. Mathias; and of the Allen Superior Court, Judge Paul Mathias, Judge Nancy Boyer and Judge Stanley Levine. Ms. Davis has also been a professor of paralegal studies at Ivy Tech State College, an adjunct professor at several other universities, and a lecturer for multiple seminars for Indiana continuing legal education. She is admitted to practice in Indiana and before the U.S. District Court, Northern and Southern districts of Indiana. Ms. Davis is also a member of the Indiana State and Lake County bar associations. She earned her B.A. degree from Indiana University at Bloomington and her J.D. degree, with honors, from Valparaiso University School of Law.

Jason D. Lazarus is the founder and chief executive officer of Synergy Settlement Services. Synergy offers healthcare lien resolution, Medicare Secondary Payer compliance services, and complex settlement consulting. He is also the managing partner and founder of the Special Needs Law Firm, a Florida law firm that provides legal services related to public benefit preservation, liens and Medicare Secondary Payer compliance. Mr. Lazarus is an Amazon best-selling author and his book, *Art of Settlement*, is a detailed guide for trial lawyers related to regulatory compliance when resolving catastrophic claims. His written work has been cited as authoritative on Medicare compliance, by the Supreme Court of Florida and the U.S. Southern District of Florida. Mr. Lazarus earned his B.A. degree from the University of Central Florida, his J.D. degree, with high honors, from Florida State University and his LL.M. degree in elder law, with distinction, from Stetson University College of Law. Mr. Lazarus is a Medicare Set Aside Consultant (MSCC) certified by the International Commission on Health Care Certification.

Paul Shalhoub is an attorney at GOLDLAW. He has spent his career working on behalf of injured victims. Mr. Shalhoub is AV Preeminent Rated by Martindale-Hubbell and his peers since 2015. He specializes in the areas of auto accidents, slip-and-fall accidents, negligent security, and premises liability at GOLDLAW. Mr. Shalhoub is a graduate of the New England School of Law and is admitted in Florida and to the U.S. District Court,

Southern District of Florida. While in law school, he interned with the Commonwealth of Massachusetts as an assistant district attorney and Greater Boston Legal Services. Mr. Shalhoub has recently been named to Florida Super Lawyers in personal injury, and has been recognized by National Trial Lawyers Top 40 under 40 Trial Lawyers in personal injury. In 2022, he was selected to join the National Trial Lawyers: Top 100 for civil plaintiff, an invitation only organization that only invites premier trial lawyers who meet stringent qualifications. Mr. Shalhoub's success in winning substantial recoveries cannot be questioned. At his prior firm, he recovered over \$20M for clients including trial verdicts and settlements from 2017-2022. In court, Mr. Shalhoub has taken on major corporations including Walmart and State-Farm and beat them, resulting in substantial awards for his clients. He has been the mayor of the town of Lake Clarke Shores since 2021 and is serving his third term on the council. Mr. Shalhoub is a member of the Young Lawyers Section (YLS) of the Palm Beach County Bar Association, and chairman/co-founder of the Annual YLS No Shave November. The event has raised over \$250,000 for Cancer Alliance of Alliance of Help and Hope. He is chair of the Florida League of Cities Finance Taxation and Personnel Committee, representing his town of Lake Clarke Shores.