

Frederick Fisher Expert Witness Experience as of March 2026						
CASE NAME	ISSUE	Open-Closed - Trial-Depo-Report	TYPE OF WORK/DATE	EXPERT FOR	LAW FIRM	Counsel's Location Case ID & Court
Williams vs Robert Driver Insurance et al	Insurance broker errors & omissions	C D T	Deposition & Trial Testimony March 2007	Defendant	walsh	Los Angeles, CA
Ahmed v Costas Ins Agency	Insurance broker errors & Bad faith claims handling	C D T	10/1/2007- Trial- Defense	Defendant	walsh	Los Angeles, CA
P & E vs Willis / Chubb et al	Adjuster Malpractice	C P D	Deposition Testimony, Dec.	Plaintiff	RONAN & FIRESTONE, PLC	Scottsdale, AZ 85260
Safeco vs County Line	Accountants & Consultants Error & Omission	C D T	Deposition & Trial Testimon	Plaintiff	Chinye Uwechue-Akpati	Encino, CA
Kovac Media Group	Accountants & Consultants Error & Omission	C D	Deposition, November 2009	Plaintiff	MILLER BARONDESS, LLP	Los Angeles
Haynes et. al. v Certain Underwriters at Lloyds	Insurer Bad Faith	C D	Deposition, March 2010	Defendant	HANSON PETERS NYE	Barrinton, Ill
RACHAL, vs COLONY INSURANCE	Insurance broker errors & omissions	C T	Deposition, Trial Oct , 2010,	Defendant	Skane & Wilcox	San Diego, CA
GENSAR SALEIGH AND CAPITOL FINANCIAL SERVICES vs C.M. MEIERS COMPANY, INC	Breach of Contract- Insurance Broker Book of Buinessissue	C T	Testimony at binding Arbitration, October 2010- Plaintiff Verdict	Plaintiff	STONE ROSENBLATT CHA, A PLC	Woodland Hills, Ca
OCS V Meimand	Insurance Broker Error & Omission	C D	Deposition Testimony, 2-28- 12	Plaintiff	Carlson Law Corp	Woodland Hills, Ca
QUANTA INDEMNITY COMPANY v BUILDERS AND TRADESMEN'S INSURANCE	Shared Loss Dispute- Breach of Contract	C T	One of 3 Mediators, April 2011	Neutral	N/A	N/A
Hoyt Roofs v Century Surety Company	Insurance broker errors & omissions	C D	Deposition, March 2012	Defendant	Jampol & Zimit	Los Angeles
MF Nut Co., LLC aka Mac Farms of Hawai'i, LLC vs. Continental Casualty Company	Insurer Standard of Care in Handling Claims (EPLI)	C R	Written report, August 2012	Plaintiff	Tom Petrus & Miller, LLLC	Honolulu, HI
ECOLITE CONCRETE USA INC VS. GS LEVINE INSURANCE SERVICES	Insurance broker errors & omissions	C D	Deposition, December, 2012	Defendant	PETTIT, KOHN, INGRASSIA & LUTZ	San Diego, CA
Companion Property Casualty Group, a South Carolina Corporation, vs Consolidated Agency Partners dba Menicucci Insurance Associates	Insurance broker errors & omissions	C R	Written Report, May 2013	Defendant	Wilson Elser Moskowitz Edelman & Dicker LLP	Los Angeles, CA
Saddleback Inn vs Certain Underwriters at Lloyds et al	Insurance broker errors & omissions	C D	Deposition, October , 2013	Defendant	Soltman, Levitt, Flaherty & Wattles LLP	Westlake Village, CA
Wondries v North River et al	Insurance broker errors & omissions	C D	Deposition, November 2013	Defendant	Jampol & Zimit	Los Angeles, CA
Melius v Underwriters at Lloyds, et al	Insurance Company Bad Faith and Underwriting Issues	C R	Written Report, January 2014, Trial Expert- Settled before trial for less than Costs of Trial	Defendant	Wilson Elser Moskowitz Edelman & Dicker LLP	LasVegas, NV
Cheema v Farmers Ins. & Tania Lane et. al	Insurance broker errors & omissions	C D T	Deposition, Trial, May 2014- Defense Verdict	Defendant	Jampol & Zimit	Los Angeles, CA
Boydjjeff v Famers- Boyd insurance	Ins Broker E&O	C R	Settled after Declaration provided	Plaintiff	Law Offices of Thomas R. Nigro	Irvine, Ca
Admiral Insurance Co v CETUSA / James River Ins.Co.	Insurance broker errors & omissions, Underwriting Issues and Standard of Care, duty to Disclose facts or Circumstances	C D T	Deposition, Dec 2014, Trial May 2015, Plaintiff Verdict	Plaintiff	MARRONE, ROBINSON, FREDERICK & FOSTER	Burbank, Ca
Petrosyan v. Gazazian, Pro-one Insurance	Insurance Broker E&O	C D	Deposition Jan, 2015, Settled for significant amount	Plaintiff	Wolk & Levine, LLP	Glendale, Ca

Passageways v Markel et al	Insurance Broker E&O	C T	Trial- January 2015-settled during Trial	Defendant	Morris, Polich & Purdy	Los Angeles, CA
Arellano vs. Panamercana Insurance, LLC et.al.	Insurance Broker Licensing Compliance	C	Settled after expert Disclosure, June 2015	Defendant	Matthew L. Eanet , Esq. P.C. and Ogletree, Deakins, Nash, Smoak & Stewart, P.C.	Los Angeles, CA
Fulton v Granite States Ins Co et. al.	Ins Broker E&O	C T	Deposition, July 2015, Trial testimony Dec. , 2015	Plaintiff	Shernoff, Bidart, Echeverria, Bentley, LLP	Los Angeles, CA
Hedron v. Zurich Ins Co	Bad Faith	C	Consultant, Trial Expert- Settled before trial	Plaintiff	GREENE BROLLET & WHEELER, LLP	Santa Barbara, CA
Shankar v Chu et al	Claims Made Coverage issues	C	Consultant	Defendant	Law offices of MOON & YANG, APC	Los Angeles, Ca
Fresh Foods Concepts Inc et al v. Zenz Insurance	Insurance Broker E&O	C R	Settled after my Declaration submitted in opposition to MSJ	Plaintiff	Affeld Grivakes Zucker LLP	Los Angeles, CA
Aloha Ins v Smith et al	Ins Broker Trade Secrets	C T	Report Submitted, Trial/Mediation Testimony Trial	Plaintiff	David Kaapu, Esq.	Kailua-Kona, Hawaii
Smith et al vs Nottage, Aloha Insurance	Ins Broker Trade Secrets, Employment Practices in an Agency	C T	Report Submitted, Trial/Mediation Testimony Trial	Counter Claim - Defendant	Kessner Umebayashi Bain & Matsunaga	Honolulu, Hawaii
Visalemo v Heather Olson	Ins Broker E&O - Certificates of Ins	C D	Deposed 02-2016	Defendant	Jampol & Zimit	Los Angeles, CA
People v Gustavo Ungo	Insurance Claim Fruaad	C	Consultant on claims Procedures 6-2016	Defendant	Law Offices of Rich Beada	Santa Monica, Ca
QBE v Lippa et al	Ins Broker Standard of Care	C R	Written Report 09-2016	Defendant	WINGET SPADAFORA & SCHWARTZBERG, LLP	Los Angeles, CA
Brambila v. Wozencraft	Ins. Broker E&O	C D	Deposed	Defendant	Jampol & Zimit	Los Angeles, CA
Epoch Insurance et. al v Phillips and AFP et al	Ins Broker Trade Secrets	C D	Deposed, Settled	Plaintiff	Carlile Patchen & Murphy LLP	Columbus, Oh
AmTrust North america, Inc v SafebuiltInsurane Services et. al.	MGA Standard ofCare, Broker fee	C R	Federal Court Expert Report submitted, Deposed awaiting Trial	Defendant	HARRIS BEACH	New York, New York
Skoolive, LLC v Nautilus Ins Co et al	Ins Broker Standard of care	C D	Declaration, won MSJ- Settled	Plaintiff	WINGERT GREBING BRUBAKER & JUSKIE LLP	San Diego, CA
Del Rayo Estates Hoeowners v LaBarre Oksnee Insurance	Ins. Broker Standard of Care	C	Consulted -Now Settled 03-17	Defendant	Liedle, Larson, Lidl & Vail, LLP	San Diego, CA
Aardema v Imperium Ins Co	Bad faith claims handling	C R	Federal Court Report Submitted, Settled thereafter 01/17	Plaintiff	LAW OFFICE OF MIKLOS VARGA	Silver Lakes, CA
Vista Freight et al v. Right Stop Insurnace	Ins.Broker E&O, Broker Fees	C	In Mediation 01- 18 -Settled	Plaintiff	CHEN, HORWITZ & FRANKLIN	Los Angeles, CA
Wilms v Amerititle	Escrow E&O	C T	Trial, Pl verdict \$1.1 mm Trebled + \$750K Punitive	Plaintiff	Hostetter Law Group, LLP	Enterprise, Ore.
Monica Investments v 1 st Century Insurance et. al	Ins Broker Standard of care	C	Settled	Plaintiff	Soltman, Levitt, Flaherty & Wattles	Thousand Oaks, Ca
Saleigh v Stone	Lawyer Standard of Care	C	My retained Cause of action dismissed	Defendant	Thompson, Coe & O'Meara	Los Angeles
Sigma Financial v. Gotham Ins. Co., et al	Ins Broker Standard of Care, Insurance Company Claims and Underwriting	C	Deposition 9-2017, Settled before Trial	Plaintiff	SALL SPENCER CALLAS & KRUEGER	Laguna Beach, CA
Mehta v Kaazing Corp. et. al	Whistle blower termiantion - D&O Standard of care	C	Settled, 10-17	Plaintiff	Collier Law Firm, LLP	San Francisco, Ca
Quintilone & Associates v. Zurich North American Insurance Co. et. al.	Bad Faith Faiure to settle, defense Lawyer Standard of Care	C	Settled	Plaintiff	The Ryan Law Firm	Monrovia, Ca
Friedman v Ryngler	Regulatory Standards for Insurance Brokers	C- T	Bench Trial in March 2021	Plaintiff	MICHAEL A.J. NANGANO, A Law Corporation	Los Angeles, Ca

MNG Engineering v Target Insurance et al	Insurance Broker Standard of care	C	Settled	Defendant	Wood Smith Henning & Berman	San Diego, CA
Orem City v Essex-Evanston Ins Co	Bad faith, Ins company Standard of Care	C R D	Report Submitted, Deposition, Settled	Plaintiff	L. Rich Humphreys, Esq	Salt Lake City, UT
Abdallah v Marshall & Sterling	Insurance Broker Standard of Care	C R	Draft Report Submitted 10-17.	Defendant	Beckstedt & Associates	St. Croix, US Virgin Islands
Godinez v Forbing et al	Ins Broker Standard of Care	C D T	Deposition, Trial Dec 2017	Plaintiff	Bendel Law Group	Los Angeles, CA
Witeby Insurance, Inc. et. al v. NFP Property & Casualty Service	Broker seperation Issues, Non-Competes	C	Settled	Defendant	Greebnberg Traurig	Sacramento, Ca
BEGOYAN V SAFECAL	Ins Broker Standard of care	C	Resolved	Defendant	Marrone , Robinson, Frederick & Foster	Burbank, Ca
Cingari v Stuka et. al	Ins Broker Standard of care	C	Settled after Disclosure	Plaintiff	Aitkin Aitkin Cohn	SantaAna, Ca
Goldberg & Fur v AON et. al	Ins Broker Standard of care, Availability of Coverage	C R D	Fed Court report 04-18, Deposed, case Settled prior to Trial	Defendant	Foley & Lardner LLP	Miami, Fl
White- Chartis v Aflalo	Ins Broker Standard of care	C D	Deposition, Settled	Defendant	WINGET SPADAFORA & SCHWARTZBERG, LLP	Los Angeles
Medina v Preferred, SIS	Ins Broker Standard of care, BadFaith	C	Settled 4-18	Defendant	Grimm, Vranjes & Greer LLP	San Diego, CA
Broadway Elite v Great American- Lockton Ins	Ins. Broker Standard of Care, Insurer Bad Faith	C	Great American Settled upon my disclosure, Trial in Oct 2020- Settled for \$Millions after more depo's on which I consulted on Questions .	Plaintiff	Alexander & Jong	Los Angeles, CA
Gravity Investments v Access Insurance	Ins Broker Standard of Care	C	Deposition, Settled	Plaintiff	Smith Law Firm, APC	Woodland Hills
Park v Target insurance	Ins Broker Standard of Care	C	Settled	Defendant	Meyers McConnell Reisz Siderman P.C.	Los Angeles
Ruiz Food v UnitedVallery et al	Ins Broker Standard of Care, Insurer Bad Faith	C	Settled after my Market research at Mediation. 8-18	Defendant	Cruser, Mitchell, Novitz, Sanchez, Gaston & Zimet, LLP	Los Angeles
Shores v Fuentes Insurance	Ins Broker Standard of Care	C	Settled	Defendant	Wools, Peer, Dollinger & Scher	Los Angeles
Gardner Denver v Arch Ins et al	Bad Faith, D&O Policies	C	Settled prior to Report due Date 2019	Plaintiff	Haynes and Boone, LLP	Washington D.C., case venued in Philadelphia, PA
Kathryn Taylor v AIG, Integro	Ins Broker Standard of Care, Bad Faith	C	Settled 2019	Plaintiff	WHITTEN BURRAGE	Oklahoma City, Ok
URS Corp v Atkinson Walsh and Companion Case	Standard of Practice in Insuring Construction Projects	C D T	Deposition April 2019, Trial July 2019, and continuing, my Involvement completed- Pl. Verdit- Jury awared \$4.8mm of \$4.9 Requested, gave Cross Plaintiff \$2.1mm of \$103 mm requested!	Plaintiff & Cross Defendant	Pepper Hamilton	Los Angeles
Fairchild Services- - Galaxy v Gallgher Bassett	TPA Standard of Care	C D	Federal Court Report Submitted, Deposition, MSJ Granted as to Fairchild	Def & X- Complaint	Tyson & Mendes	Los Angeles
OPHEIKENS v BLISS SEQUOIA INSURANCE & RISK	Ins Broker Standard of Care	C R	State Court Report (NV) Submitted, Settled, See Companian case Below	Plaintiff	Godfrey Johnson, PLC	Denver, Co
Digilock v Wells Fargo Ins- USI Insurance	Ins Broker Standard of Care- D&O coverage availability	C R	Federal Court Reports exchanged, settled at Mediation.	Defendant	Lewis Brisbois	Los Angeles

1706 Maple v Youssefyeh	Ins Broker Standard of Care	C	Declaration provided, Summary Judgement for Defense granted	Defendant	Marrone , Robinson, Frederick & Foster	Burbank
Monrovia Hospital v Seaport Ins	Ins Broker standard of care	C D	Deposition Taken, Defense Motion in Limine granted, case Settled. Nov 2019	Defendants	Robinson Di Lando APLC	Los Angeles
Parkview Hospital v Pridemark Everest Ins	Ins Broker Standard of care	C D	Deposition then- case settled thereafter for significantly less than the last Plaintiff offer prior to resolution. Jan 2020	Defendants	Cruser, Mitchell, Novitz, Sanchez, Gaston & Zimet, LLP	
Gardner v Bliss Sequioa et al	Ins Broker Standard of Care	C D	Campanian Case to Opheikens, Plaintiffs are now assignees to causes of action for Broker Malpractice	Plaintiffs	Campbell & Williams	Las Vegas, NV
Yao v Prouse	Ins Broker Standard of Care	P	Insurance Broker Standard of Care	Defense	Marrone , Robinson, Frederick & Foster	Burbank
AIG Inc, LLC dba Maggie's Kitchen v Marlen Paoletta Ins.	Ins Broker Standard fo Care	C	Failure to properly obtain limits requested, Settled	Plaintiff	Winthrop Law Group	Newport Beach, Ca
Geothermal Resource Group v Costello, Desert Empire Insurance	Ins Broker Standard of Care	C	Failure to properly Insure Independent Contractors, settled after Designations, Jan 2020	Defense	Collins, Collins, Muir & Stewart	Rancho Cucamonga, CA
Yamada v Eastbluff Insurance	Ins Broker Standard of Care	C	Failure to Provide "complete" Coverage, seetled at Mediation after Declaration exchange in support of Defendat's MSJ. Jan 2020	Defense	CRUSER, MITCHELL, NOVITZ, Sanchez, Gaston & Zimet, LLP	Los Angeles. CA
Kelpe Group v TBG West Ins	Insurance Broker Standard of Care	C	Alleged failue to assist in getting a Diasability claim paid- Settled after my deposition	Defense	Cruser, Mitchell, Novitz, Sanchez, Gaston & Zimet, Los Angeles. CA	
Brosamer v Indian Harbor Ins Co	Bad Faith, Denial of Coverage	C R	Hired on a Monday to draft Rebutal Report of Defendant's Expert. Report Submitted the following Friday. 2 weeks later case Settled, March 2020	Plaintiff	Hanson Bridgett LLP	San Francisco, CA
Associated Industries Ins Co v McNicholas	Does Policy Claims Made Disclosure meet generally accepted Standards	C D	Federal Court report issued 9-20-20	Plaintiff	Cozen & O'Connor	Los Angeles. CA
Nelson V Traveler set al	Ins Broker Standard of Care	C	Settled after MSJ Declarations	Plaintiff	Jerry Kroll, Esq.	Santa Barbara, Ca
Miller v AON	Insurance Broker Standard of Care	C	Settled	Defense	Foley & Gardner	Los Angeles, Ca
Wilson, et al. v. Interwest Ins	Insurance Broker Standard of Care	C D T- S	Deposed- Trial- Settled	Plaintiff	Downey Broand	Sacramento, CA

Gardena Specialized- Palatas V A.J. Gallagher et. al.	Insurance Broker standard of Care	C	Deposed- Settled	Plaintiff	Reif Law Group	Los Angeles, CA
HOC Events v Liberty Mutual Ins Co, Insureon Ins	Insurance Broker Standard of Care	C	Settled	Defense	CRUSER, MITCHELL, NOVITZ, Sanchez, Gaston & Zimet, LLP	Los Angeles, Ca
GlassHouse Tech v Marsh et al	Insurance Broker Standard of Care	C	Cosulted- MSG Granted	Defense	Day Pitney	Boston, MA
Reyes v Farmers	Insurance Broker Standard of Care	C	Settled before any work conducted Sept 2020	Defense	Gordon & Rees	San Diego, CA
Ward v Certain Underwriters at Lloyds	Insurer Standard of Care in Handling Claims	C R	Expert Reports Exchanged with Rebuttals & Oppositions, Settled Aug 2020	Defense	Clyde & Co. & Vogrin Frimet	San Francisco, New York & Los Angeles
ALPS Ins Co v Kalicki Collier	Insurer Standard of Care in Handling Claims, Claims Made disclosure issues	C R	Federal Court Report in 9-2020 Summary Judgement Granted-	Plaintiff	Kutak Rock LLP	Omaha, NE
Progressive Transportation v Bowermaster Transportation	Insurance Broker Stabndard of Care	C	Declaration provided for Mediation 8-2020, Settled	Defense	Cruser, Mitchell, Novitz, Sanchez, Gaston & Zimet, LLP	Los Angeles, CA
Golden Bear Insurance Co. v Evanston Ins Co, Starstone Ins Co	Excess Insurer issues	C	Expert Report submitted dated Jan 2020	Defense	Ames & Ames, LLP	Park City, Utah
AGS Renovation v Nat Union Ins Co, Westlake Ins	Ins Broker Standard of Care	C	Settled while Case Developing, settled in Mediation	Plaintiff	Joseph Oliva & Associates, P.C.	San Diego, CA
Khlebnikova et. al v. McLaren Ins	Ins Broker Standard of Care	C	Deposed- settled	Plaintiff	Giragossian Law, Inc.	Pasadena, Ca
Oronoz v Farmers	Ins Broker Standard of Care	C	Settled	Plaintiff	Scheidemantle Law Group, P.C.	Pasadena, Ca
S.Evergreen holdings, Savers Inc v Aon et al	Ins Broker Standard of Care	C	Federal Court reports & Rebuttals filed, Settled	Defense	Foley & Lardner LLP	Los Angeles, CA
Brooklin Restaurants inc v Snapp Insurance	Ins Broker Standard of Care	C	Settled	Defense	Pettit -Kohn	San Diego, CA
US Specialty v Hardrock- and X compl	Ins. Broker Standard of Care, Insurer Bad Faith	C	Expert Reports exchanged and Depositons taken, Settled with Assignment	Plaintiff	Buscemi Hallett, LLP	San Diego, Ca
Cascade Farmers Mutual Ins Co v. Knapp, et. al	Insurance Broker Standard of Care	C	Settled	Plaintiff	HAGESTAD LAW GROUP, PLLC	Missoula, MT
Montri v Joan Allyn Schultz	Insurance Broker Standard of Care	C	Settled	Plaintiff	Engstrom, Lipscomb & Lack	Los Angeles, CA
ABBOUSHI v. CASURANCE AGENCY INSURANCE	Insurance Broker Standard of Care	C	Closed	Plaintiff	Arnold Law Firm	Sacramento, CA
J W Rigney Construction Inc v Hegarty Ins	Insurance Broker Standard of Care	O	On Hold	Plaintiff	Akay Law	San Francisco, Ca
Johnson v. Allstate	Insurance bad Faith	C	Resolved	Plaintiff	IVIE McNEILL WYATT PURCELL & DIGGS	Los Angeles, Ca
34th Street Hotel Ventures v Aon Risk Serivces Northeast	Insurance Broker Standard of Care	C	Rebuttal Report, Deposed Settled	Defense	Foley & Lardner LLP	New York, New York
Biafora Ltd v Farmers et al	Insurance Broker Standard of Care	C	Settled	Defense	Cruser Mitchell et al	Los Angeles, Ca
MK Management v Sima Shahinpar	Insurance Broker Standard of Care	C	Settled	Defnese	Cruser Mitchell et al	Los Angeles, Ca
NCCA v Gray Stone Insurance	Insurance Broker Standard of Care	C	Settled	Defense	Cruser Mitchell et al	Los Angeles, Ca
Marinaro v Terpinig Insurance	Ins Broker Standard of Care	C	Settled	Defense	Cruser Mitchell et al	Los Angeles, Ca
Huntington Bank v AIG IMS et al	Claims masde issues, Duty to Disclose Potential Claims	C	Settled	Defense	Arnold & Porter	Denver, Co.
EC Supply v HA insurance, RIC, Kinsale	Retial Broker Standad of Care	C R	Settled after Mediation Report Submitted	Defense	Cruser Mitchell et al	Los Angeles, CA

Goldstein et. al. V Wyoming Financial Services Insurance	Ins Broker Standard of Care	C R	Rebuttal Report Submitted- Settled	Defense	Hickey & Evans, LLP	Cheyenne, Wyoming	
Baca v Knights of Columbus	Breach of Producer Contract- Agent v Insurer	C	Settled	Plaintiff	Michael Nangano, Esq.	Pasadena, Ca	
Parkside HOA v Travelers Ins Co	Insurer Bad Faith	C	Resolved	Plaintiff	Arnold Law Firm	San Diego, Ca	
Scoales v State Farm Ins Co	Insurer Bad Faith	C R	Settled after reports	Plaintiff	Nix Patterson, L.L.P.	Austin, Tx	
Oya -Taylor v Lexington ins	Ins. Broker Standard of care	C	Settled	Defendant	Cruiser Mitchell et. al.	Los Angeles, Ca	
Cardona v Pacific CoastTruck Ins	Ins. Broker Standard of Care	C	Settled -Deposed	Plaintiff	Winthrop Law Gorup	Newport Beach, Ca	
3 B Tech v Hui	Ins. Broker Standard ofCare	C	Dismissed	Defense	Cruzer, Mitchell et. al	Los Angeles, Ca	
Malmazada v. Farmers Group	Ins. Broker Standard ofCare	C	Settled	Defense	Cruzer, Mitchell et. al	Los Angeles, Ca	
Setareh V Acrisure	Ins. Broker Standard of Care	C	Settled Trial	Defense	Cruzer, Mitchell et. al	Los Angeles, Ca	
FlatIron Constructors v Lexington	Insurer Bad Faith	C	Rebuttal Report, Deposed, Arbitrated	Plaintiff	Sherman & Howard	Denver, Co	
TKO v Canopius US Insurance	Insurer Bad Faith	C	Deposed, Trial	Defense	Soltman, Levitt, Flaherty & Wattles LLP	Thousand Oaks, CA	
Ong v Lee	Ins . Broker Standard of Care	C	Consultied, Settled	Defense	Cruzer, Mitchell et. al	Los Angeles, Ca	
3AXC Cano v CBIS, Marsala and AMTrust	Ins. Broker Standard of Care	C	Settled	Plaintiff	Law Offices of Mariano Alvarez	Torrance, Ca	
Anna Shay v Lloyds, Hub Ins	Ins. Broker Standard of Care	C	Resolved	Defense	Gaglione, Dolan & Kaplan	Los Angeles, CA	
California Development v_ ProSource Insurance	Ins. Broker Standard ofCare	C	Resolved	Defense	Pettit Kohn	San Diego, Ca	
James & Bentz v Johnson & Johnson, Hub	Ins Broker Standardof Care	C	Settled	Plaintiff	ROBINS CLOUD LLP	Santa Monica , Ca	Superior Court, County of Los Angeles, Case No. 20ST CV42902
Linsao v Underwriters at Lloyds	Ins. Company Bad Faith	C	Settled	Defense	Soltman, Levitt, Flaherty & Wattles LLP	Thousand Oaks, Ca	
Questar Pools et al v Lowder Ins	Ins. Broker Standard of Care	C	Early Stages	Plaintiff	Noon & Associates, PC	San Diego, CA	
SBT Properties v Simmons	Ins. Broker Standard of Care	C	Settled	Defense	Abott Law Group, P.C.	Portland, Ore	
Valencia v Sierra Insurance	Ins. Broker Standard of Care	C	Settled	Defense	Baker, Keener & Nahra, LLP	Los Angeles,CA	
Aldrich v Hunsaker, Farmers Ins-	Ins.Broker Stanfdard of Care	C	Settled	Defense	Gordon Rees Scully Mansukhani	Irvine, Ca	Superior Court, County of Sonoma, Case # SCV-268100
Canna Cruz v Scurich Ins	Ins. Broker Standard of Care	C	Settled	Defense	Lewis Brisbois	San Francisco, CA	
Emerson Equity v Forge , Lloyds	Ins. Broker Standard, Insurer Bad Faith	C	Withdrew	Plaintiff	Reif Law Group	Los Angeles, Ca	Superior Court, County of San Mateo, Case # 22-CIV-03732
Skura v Alon Pesso Elite Insurance	Ins. Broker Standard of Care	C	Settled	X-Defendant	Baker, Keener &Nahra, LLP	Los Angeles, CA	Superior Court, County of Los Angeles, Case No. 21STCV02797
Kelley v. Massachusetts Bay Ins	Ins. Company Bad Faith	C	Settled	Plaintiff	Duffy + Fulginiti	Phila. Pa	Federal Court
Kronsberg v. Wallen	Ins. Broker Standard of Care	C	Settled	Defense	Lewis, Brisbois	Los Angeles, Ca	Superior Court, County of Los Angeles, Case No. 20STCV31559
Roncar v Travelers , Jaffee Ins	Ins. Broker Standard of Care	C	Settled	Plaintiff	Resolve Litigation	Long Beach, Ca	Superior Court, County of Los Angeles,Case No. 21 STCV30460
Lorenzo et al v Global Century Ins- Solutions Specialty	Ins. Broker Standard of Care	O	Early Stages	Defense	Murchison & Cumming	Los Angeles, Ca	Superior Court, County of Los Angeles, Case 20STCV23961
TDIC v Joseph Yousefian	Ins. Company Bad Faith	C	Expert Report, Deposed, Settled X-Plaintiff		Gordon Tilden Thomas & Cordell LLP	Seattle, Wa	US District Court, Western District of Washingotn at Seattle Case No. 2:20-CV-01076-RSL
Lexington Insurnce Co. v Veolia et. al	Claims Made Coverage issues	C	Rebuttal Report, deposition	Defendant	Fellows & LaBriola	Atlanta , GA	American Aritratation Association, Atlanta , GA
Whalen v Cheda	Ins Broker Standardo f Care	C	Declaration. Settled	Defendant	Murchison & Cummings	Los Angeles, CA	Superior Court, County of Sonoma, Case # SCV-268468
Apex Solutions, Inc. vs. Fidens et al	Ins Broker Standard of Care	C	Settled	Defendant	Murchison & Cummings	Los Angeles, CA	Superior Court, County of Alameda, Case RG21099709
Caruso Affiliated Holdings v AJ Gallgher Insurance	Ins Broker Standard of Care	C D T	Deposed- Trial- Def Verdict	Defendant	Anderson, McPharlin & Conner	Los Angeles, CA	Superior Court, County of Los Angeles, Case 21STCV12443
Fazio Incorporated et. al. v LMK Holdings dba Alle Lawrence & Associates	Ins Broker Standard of Care	P	Pending- Early Stagtes	Plaintiff	Reif Law Group	Los Angeles, CA	Superior Court, County of Los Angeles, Case 21STCV24363
RICO- AUTO COLLISION GROUP, INC., v. Farmers ins	Ins Broker Standard of Care	O	Early Stages	Plaintiff	Law Offices of Allan E. Perry	Brea, Ca	Pending
Smart stop Self Storage REIT, Inc et al v Tripemco Burlington Insurance Group	Ins Broker Standard of Care	C	Settled	Plaintiff	Zelms Erlich & Mack	Woodland Hills, Ca	Superior Court, County of Orange, Case 30-2020-01142726-CU-BC-CJC

Archuleta v 1 Source Insurance	Insurance Broker Standard of Care	C R	Settled	Defense	Pyatt Silvestri Law	Las Vegas, NV	Dist. Court, Clark County, NV, CASE NO: A-21-831643-C DEPT. NO: 32
AMC American Marine v Brown & Brown Ins.	Insurance Broker Standard of Care	C		Defense	Adams Krek LLP	Honolulu, Hawaii	Circuit Court of the First Circuit, State of Hawai'i
Coope V Adams, George Peterson Insurance	Insurance Broker Standard of Care	C	Settled	Defense	Freeman Mathis & Gary, LLP	Walnut Creek, CA	TBD
DM Restaurant Group, Inc v Everguard Insurance Group, inc.	Insurance Broker Standard of Care	C	Settled	Defense	WINGET SPADAFORA & SCHWARTZBERG, LLP	Los Angeles, CA	Superior Court, County of Los Angeles Case 20STCV50057
F.A.I.R. Plan v GMGS Risk Mangement & Insurance	Insurance Broker Standard of Care	O	Earlry Stages	Defense	Zelms Erlich & Mack	Woodland Hills, Ca	Superior Court, County of Los Angeles Case 23STCV06638
Fairwinds v. Kinsale Ins. et al.	Insurance Broker Standard of Care	C	Settled	Defense		Redwood City, Ca	Superior Court, County of Napa, Calif., 21CV001288
Guidry v AA Auto Genius Ins	Insurance Broker Standard of Care	C	Settled	Defense	Hayes Scott Bonino Ellingson Baker, Keener & Nahra	Los Angeles, Ca	Superior Court, County of Los Angeles, 22STCV32352
Meadowview v Underwriters -Lloyds, Gosrst & Co.	Insurance Company Bad Faith and Underwriting Issues	C D	Settled	Defense	Wilson Elser Moskowitz Edelman & Dicker LLP	Los Angeles, Ca	Superior Court, County of Los Angeles, 21STCV10904
Ramirez v Save In Insurance	Insurance Broker Standard of Care	C	Settled	Defense	Murchison & Cummings	Los Angeles, Ca	Superior Court, County od San Bernardino, CIVSB2130998
Repaul v Cross Insurance agency , et al	Insurance Broker Standard of Care	C	Settled	Plaintiff	Howard & Howard	Las Vegas, NV	Superior court State of Washington, Pierce County, 23-2-04287-1
Sander Sales v Insure Secure	Insurance Broker Standard of Care	C	Settled	Defense	Murchison & Cummings	Los Angeles, Ca	Pending
Dennis Heagle v Staebel Insurance	Insurance Broker Standard of Care	C R	Settled	Plaintiff	KRIVIT LAW	Denver, CO	Dist. Court, Jeffeson County,Co. County, Case Number: 2023CV31678
Windsong v. AmWins	Insurance Broker Standard of Care	C	Settled	Defense	Jones-Bell	Los Angeles, Ca	Dist. Court, Clark County, NV, A-21-839570-C, Dpt. XIV
Rosenberg, Hodson & Oee et . Al. v Mosser Companies et.a l	General Industry Standards on Bonds	C	Hold	Plaintiffs	Salinas Law Group	Oakland, Ca	Superior Court, County of Alameda, RG21100160
Podesta et al v Roque	Insurance Broker Statndard of Care	C	deposed	Plaintiffs	David Syme Esq.	Orinda, CA	Superior Court, County of Santa Cruz, 21CV00517
Rhoades et . Al v New Alliance Insurance Brokers	Insurance Broker Statndard of Care	C	Withdrew	Plaintiffs	Ernst Law Group	San Luis Obispo, Ca	US District Court Central Dist. Of Calif., Case No. 2:24-cv-01682-GW (AGRx)
Katelman v Dewitt Stern of California et. al.	Insurance Broker Standard of Care	C	Settled	Defense	Freeman Mathis & Gary, LLP	Los Angeles,CA	Superior Court, County of Los Angeles, Case 20STCV40296
Cooper v Adams	Insurance Broker Standard of Care	C	Settled	Defense	Freeman Mathis & Gary, LLP	Sonoma, Ca	Sonoma County Superior Court, Case SSV-269735
DM Restaurant Group, Inc., v Everguard Ins, NFP et al	Insurnace Underwrter Standard	C	Early Stages	Defense	Winget, Spadafora and Schwartzberg, LLP	Los Angeles, Ca.	Superior Court, County of Los Angeles, Case No. 20STCV40057
R.L. Kirk Construction et al v Colonial General	Insurance Broker Standard of Care	C D	Settled	Plaintiff	Humphry Law	Bountilfu, Utah	3rd Judicial Dist. Of Salt Lake County, Slat Lake Dept. Case # 230907417
Rotax V Daragon Insurance	Insurance Broker Standard of Care	O	D 7-18-2024	Defense	TADJEDIN THOMAS & ENGBLOOM LAW GROUP LLP	Culver City , Cal	Superior Court, County of Los Angeles, Case 20 STCV10768
Stephouse Recovery v CPH Insurance et. al	Insurance Broker Standard of Care	C	Settled	Defense	Collins & Collins, LLP	Orange, Ca	Superior Court, County of Orange, Case No. 0-2023-01327093-CU-BC-WJC
Cano v Julia Saucedo	Insurance Broker Standard of Care	C	Settled	Defense	Wools, Peer, Dollinger & Scher	Los Angeles, CA	Superior Court, County of Los Angeles, N. Dist, 22AVCV00386
Gordon Root et al v CNA, Topco Agency	Insurance Broker Standard of Care	O	Deposed 12-19-25	Defense	ZELMS ERLICH & MACK	Woodland Hills, CA	Superior Court, County of Los Angeles, Case No. 21ST CV 38762
Young Generation Video Skura v. Pessio Elite Ins	Insurance Broker Standard of Care	O	Early Stages-	Defense	Baker, Keener & Nahra	Los Angeles, CA	Superior Court, County of Los Angeles, Case No. 21STCV02797
Loera & Loera Family Trust & Estevez v Cushman ad Salgado et al	Insurance Broker Standard of Care	C R D	Settled- Report- Depo	Defense	The Feldman Firm, A Professional Corp	Las Vegas, NV	Dist Court, Clark County, Nevada A-22-859246-C Dept. 17

US Bus Charter & Lim v Carolina Casualty	Insurance Broker Standard of Care, Insurer Bad Faith	C	Closed	Plaintiff	Reif Law Group	Los Angeles,CA	Superior Court, County of Los Angeles, Case No. 23 STCV07779
Stickelberger v Branch Financial	Insurance Broker Standard of Care	O R	Reports Exchnaged	Defense	The Hustead Law Firm	Denver, Co.	US District Court for the Dist. Of Colorado, Case 1:24-cv-00386-SHP
Chinowth & Cohen v Paradigm Ins	Insurance Broker Standard of Care	C	Early Stages, Report	Defense	Lewis Brisbois, et. al.	Kansas City, Mo.	Dist. Court of Tulsa County, Case CJ-2023-03031
Rohani v Mercury Casualty	Insurer Bad Faith	O, D	Late 2025 Trial	Plaintiff	Madison Law	Irvine, Ca	Superior Court, County of Orange, Case No. 2023-01322923-CU-IC-CXC
BD&J, PC v. Lamarche Insurance Agency, Inc	Insurance Broker Standard of Care	C D	Settled	Defense	Lewis Brisbois, et. al.	Los Angeles, Ca	Superior Court, County of Los Angeles, Case No: 23SMCV04647
Floyd v USI, Marsh et al	Insurance Broker Standard of Care	C D	Report, Rebuttal Report, Depo CLOSED- Settled	Plaintiff	Ver Ploeg & Marino	Miami, Fl	US Distric Court, Northern Distric of Florida, CASE NO.: 3:24-cv-00095-TKW-HTC
Empey et. a. v AAA et akl	Insurance Broker Standard of Care, Insurer Bad Faith	O R	Report	Defense	Snell & Wilmer	Salt Lake City, UT	Third Judicial Dist. For Salt Lake County, Ut, Case 230900024
Malaspina v McGowan & Company	Insurance Broker Standard of Care	O	Early Stages	Defense	Cruser, Mitchell, Novitz, Sanchez et. al.	Los Angeles, CA	Superior Court, County of San Mateo, Case # 23-CIV-01783
Niaki v Nabavian	Insurance Broker Standard of Care	O	Early Stages	Plaintiff	LA Law Group	Chatsworth, Ca	Superior Court, County of Orange, Case No: 30-2020-01154326-CU-BC-NJC
First American Specialty v CCIS Bonding & Insurance Services	Insurance Broker Standard of Care	O	Mediation- Early stages	Defense	Long & Levitt	San Francisco, CA	American Arbitration Accociation, Case 01-23-004-1388
Abhari -Donya Entertainment, Inc. v Farmers et	Insurance Broker Standard of Care, Bad Faith	T	Trial -Defense Verdict	Defense	Tharpe & Howell	Thousand Oaks Ca	Superior Court, County of Los Angeles, Santa Monica, Case No: 22 ST CV24750
Jason McDonald v Roamly Insurance et al	Insurance Broker Standard of Care	C	Summary Judgemnt Granted	Defense	Murchison & Cummings	Los Angeles, Ca	US Distric Court, Central District of California CASE NO. 2-23-cv-09770-FLA-JPR
Gross V Scottsdale Insurance	Insurer Bad Faith	O R	Reports exchanged	Plaintiff	Quadra & Coll, LLP	San Francisco, CA	US Distric Court, Northern District of California CASE NO. 5:24-cv-02069-EJD
Chan v Sood, Ask Financial & Insurance Service	Insurance Broker Standard of Care	O	Early Stages	Defense	Goldberg Segalla	Philadelphia	Superior Court, County of Los Angeles, Santa Monica, Case No: 25S+M CV02126
CENECORE v CKFIS, dba CAL-KOR Ins	Insurance Broker Standard of Care	C D T	Declaration, Deposition,Trial	Defense	Lewis -Brisbois	Los Angeles	Superior Court, County of Los Angeles, Case # 2 3NWCVO2530
Halley v O'shea Insurance Agency	Insurance Broker Standard of Care	C S	Deposed- Settled	Defense	Lewis -Brisbois	Los Angeles	Superior Court, County of Los Angeles, Case 23SMCV01291
LILLY PROPERTY MANAGEMENT v United agencies	Insurance Broker Standard of Care	O	Early Stages	Defense	Skane -Mills	Los Angeles	Superior Court, County of Los Angeles, Case # 24STCV15115
Clark Pest Control v. Houston Casualty Company	Bad Faith and Carrer - Broker Relationship	O	Early Stages	Defense	Troutman Pepper Locke	Irvine, Ca	Superiior Court , County of Kern, Case # BCV-23-102333
Steinberg v Proctor- Toni Davis & Proctor Insurance	Life Agent Standard of Care	C T	Trial -PI, verdict but well under reserve	Defense	Lewis -Brisbois	Loa Angeles, Ca	Superior Court, County of Orange, Case No: 30-2024-01372506-CU-PN-CJC
Association of Apt Owners of Aina-Nalu v. Insurance Associates, Insurance Broker Standardof Care Inc		O	Early Stages	Plaintiff	Strange LLP	Los Angeles, CA	CIRCUIT COURT OF THE SECOND CIRCUIT STATE OF HAWAI'I, Case
522 Wilshire v United Agencies	Insurance Broker Standard of care	O	Early Stages, Declaration	Defense	Skane -Mills	Los Angeles,CA	Superior Court, County of Los Angeles, Case # 24STCV15115
Halley et al. v O'Shea Ins	Insurance Broker Standard of Care	O	Early Stages	Defense	Lewis- Brisbois	Los angeles	Superior Court, County of Los Angeles, Case # 23SMCV01291
Mckenny v Mark Johnson	Insurer Bad Faith	C D	Deposition, Settled	Plaintiff	SIERRA LITIGATION	Fresno, Ca	Superior Court, County of Fresno, Ca, Case #23CECG00216

Ritz Systems, Inc. v. SGIB Insurance Services, Inc., et al	Insurance Broker Standard of Care	C	Settled	Defense	Gordon, Rees, Scully, Mansukhani	Los Angeles, Ca	Superior Court, County of Los Angeles, Case # 35TCV26878
Diana Haro v Ezone Ins	Insurance Broker Standard of Care	O	Early Stage	Defense	Skane -Mills	Los Angeles, Ca	Superior Court, County of Los Angeles, Case # 22CHCV01122
B&T Insurance and Financial v Li Pham, Decho General	Commercial Dispute- Unfair Competition	O	Early Stages	Defense/X-Complainant	Donohoo Rhine PC	Rancho Santa Fe, CA	Superior Court, County of Orange, Case No: 30-2020-01151081-CU-CO-CJC
Gatekeepers Security v. Commercial Bunisnes World	Insurance Broker Standard of Care	O	Early Stages	Defense	Collins & Collins, LLP	Carlsbad, Ca	Superior Court, County of San Diego, N. Judicial Dist, Case# 24CU006712N
Monahan Parker v MOC Insurance Services, LLC	Insurnace Broker Standard of Care	O	Early Stages	Defense	Lewis-Brisbois	San Francisco	Superior Court, County of Marin, Case# CIV2200992
Horn, Adams Estate of Arias v Sedgwick Claims , Am Alt Ins	Ins adjuster Liability- 3rd Party	O	Early Stages	Defense	WINGET SPADAFORA & SCHWARTZBERG, LLP	Los Angeles	U S DIST. CRT, CENTRAL DISTRICT OF CALIFORNIA, Case 5:25-cv-00417-JWH-SP
Emcor Group v Zurich American	Bad Faith and Claim Handling	O	Early Stages	Plaintiff	JOSEPH OLIVA & ASSOCIATES, P.C.	San Diego	U S DIST. CRT, CENTRAL DISTRICT OF CALIFORNIA, Case No. 2:22-cv-04384-JLS-MAA
Semler Companies et. al. v Valley Forge Insurance Co andrelated State Court Action Semler et .al. v Simon Gurfinkel Insurance	Bad Faith, Ins Broker Liability	C	Settled	Plaintiff	JOSEPH OLIVA & ASSOCIATES, P.C.	San Diego	U S DIST. CRT, CENTRAL DISTRICT OF CALIFORNIA Case 2:25-CV-03808-HDV-RAO; Superior Court, County of Los Angeles, Case # 26SMCV00450
Krask v Greespan	Breach of Contract, Negligence, Unfair Business Pratices	O	Early Stages	Plaintiff	LAW OFFICES OF JOEL T. SHACKELFORD	Los Angeles, CA	Superior Court, County of Los Angeles, Case # 25CHCV01156
Laurel Creek LP v Travelers & Morris & Garritano	Broker Liability, Insurer Bad Faith	O	Early Stages	Plaintiff	THE STOLL LAW FIRM	Santa Barbara, Ca	Superior Court, County of Santa Barbara, Case # 25CV02730
Grace v Reed	Ins. Broker Liability	O	Confidential Mediation Report and Rebuttal Submitted	Defendant	Gordon Rees Scully Mansukhani	St. Louis, Mo.	Dist. Court of Douglas County, Kansas Civic Div. # DG-2025-CV-000286
Ruckman et.al. v CIG Ins Co et. al	Insurer Reserving Practices	O	Depo Scheduled	Plaintiff	Rodriguez & Associates	Bakersfield, Ca	Superior Court, County of Kern, Case No: BCV-23-103468
Walden v National Indemnity	Insurer Bad Faith	O	Report Submtted	Plaintiff	Morrin Law Office	Richmond, Ky	US Dist Crt, E.D. Ky., Case No. 5:22-cv-00238-KKC