

RISK MANAGEMENT PARTNERS, INC.
INSURANCE AND RISK MANAGEMENT EXPERT WITNESS SERVICES

SCOTT STEIN

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Areas of Expertise: Agent and Broker Procedures, Insurance Agent and Broker Liability, Insurance Errors and Omissions, Professional Liability Insurance, Directors and Officers Insurance, Insurance Coverage, Property & Casualty Insurance, Agency Standards of Care, Errors and Omissions Insurance, Insurance Disputes-Sales Practices and Bad Faith, Risk Management Practices and Procedures, Insurance Contract Review, Insurance Proposals, Umbrella Liability, Insurance Compliance, Intermediary and Broker Procedures, Risk Management Analysis for Insured's.

Professional Experience: Insurance and Risk Management: President February 2000 to Present
Risk Management Partners, Inc. / Intellectual Property Risk Resources, Inc. Weston, FL

For Risk Management Partners, Inc.: Founded retail insurance broker for property/casualty covers. Specific specialization in professional liability to include: medical malpractice, professional legal liability, directors and officers cover, architects and engineers, real estate, and miscellaneous errors and omissions insurance. Additional placement of workers compensation and umbrella and excess policies. Agency membership in the Florida Association of Insurance Agents, and membership within the Independent Insurance Agencies as a Trusted Choice Agency. Extensive placement of covers with Wholesale Insurance Brokers, and through direct agency contract placements. Members: Professional Liability Underwriting Society (PLUS) 1994-Present.

For Intellectual Property Risk Resources, Inc.: Founded organization dedicated to comprehensively addressing risk management for intellectual property. Integrated critical resources, including IP valuation and assessment tools and relationships culminating in development of proprietary intellectual property underwriting models enabling predictability of risk. Originated exclusive intellectual property insurance programs for risks domiciled in the United States. Separate exclusive program created for Israeli domiciled exposures. Forged corporate partnership with leading US program administrator enabling IPRR to distribute, market, and sell intellectual property insurance products on a co-branded basis. Developed consulting relationships with insurance carriers and brokers requesting our resources and guidance. Integrated IPRR's services within IP and multi-practice law firms to cross-promote. Drafted studies on IP exposures for determination of monetization potential and applicability of utilization of corporate IP assets for financing options. Frequent speaker to various organizations on IP risk management and overviews of the market in media interviews.

Coordinated national sales and marketing of proprietary patent infringement insurance program underwritten by syndicates at Lloyds of London. Responsibilities included direct client sales, development of national sales team, product distribution, and marketing and public relations activities. Marketing responsibilities included coordination of advertising, public relations, brochures, and sales literature. Distribution responsibilities included creation of marketing alliances with wholesale and retail insurance brokerage operations throughout the United States, as well as the development of partnership arrangements with key trade organizations from which we were able to leverage sales opportunities and exclusivity agreements. Frequent speeches and media interviews as spokesperson for IPRM. Program budget and financial projection responsibilities.

Account Executive *Arthur J. Gallagher and Company, Inc.* Miami, FL March 1993 to February 1998

Producer in commercial accounts division of multinational risk management brokerage organization responsible for sales, marketing, and retention of client insurance programs. Specialization in professional liability insurance to include directors and officers and errors and omissions coverage for publicly traded companies. Expertise in banking, real estate, and professional

Educational Profile B.B.A., Finance May 1984 *George Washington University*
Washington, DC School of Government & Business Administration

Associate in Risk Management (ARM) May 1997 *Insurance Institute of America* Malvern, PA



***Intellectual Property Risk Management, a division of
Summit Global Partners, Inc.***

Boca Raton, FL