AREA

The American Rehabilitation Economics Association

proudly presents

Charting Your Course

for Success

AREA Annual Conference

May 11-13, 2017

San Diego Yacht Club

1011 Anchorage Lane | San Diego, CA 92106

American Rehabilitation Economics Association

PO Box 19941, San Diego, CA 92159-9941 • 800.317.2732 / 619.440.2650 • area@gasvcs.net • www.a-r-e-a.org

2017 AREA CONFERENCE SCHEDULE

San Diego Yacht Club

Thursday, May 11	**Boot Camp** (Continental Breakfast & Plated Lunch included)	9:00 am - 5:00 pm
Friday, May 12	**Main Conference** (Classic Breakfast Buffet included | LUNCH ON YOUR OWN)	8:00 am - 5:15 pm
	President's Reception (Cocktails & light hors d'oeuvres)	5:30-7:30 pm
	There will be a special table at the reception for those interested in the *Get-together for Old Salts and New.	
Saturday, May 13	**Main Conference** (Breakfast & Lunch Buffets included)	8:15 am - 4:15 pm
	Annual Business Meeting	4:30-6:00 pm

THURSDAY, MAY 11th

Dual-Track Boot Camp

9:00 am - 5:00 pm

Breaks: 10:15–10:30 am; 3:00–3:15 pm
Deli Counter Lunch Buffet: 12:00–1:30 pm

INTERMEDIATE: Back to Basics: Present Value Calculations

Allyn B. Needham Ph.D. CEA
Shipp, Needham & Durham LLC (6.0 CEUs)

ADVANCED: Life Care Planning, Medical Price Forecasts, and the Present Value of a Life Care Plan

Herb Burkman Ph.D.
J. Herbert Burkman & Associates Economic Research

Carol Hyland MS CLCP CDMS
Hyland & Associates (6.0 CEUs)

FRIDAY, MAY 12th

Opening Remarks and Welcome

8:00 am - 9:30 am

SESSION 1
Legal Guidance in the State of California: PI, WD, and Employment Cases

Barry Ben-Zion Ph.D.
Consulting Economist (1.5 CEUs)

Refreshment Break—9:30-9:45 am

9:45 am - 10:45 am

SESSION 2
Reasonable Costs for Personal Injury Cases in California

Tami Rockholt RN BSN
Rockholt & Associates LLC (1.0 CEU)

Refreshment Break—10:45-11:00 am

11:00 am - 12:00 pm

SESSION 3
Current Status of Affordable Care Act As It Relates to Life Care Plans

Victor A. Matheson Ph.D.
College of the Holy Cross (1.0 CEU)

LUNCH ON YOUR OWN—12:15-1:45 pm

FRIDAY, MAY 12th *(continued)*

2:00 pm - 3:30 pm

SESSION 4
Ethics in a Forensic Setting

Reg Gibbs
MS CRC LCPC CBIS CLCP FIALCP
Rocky Mountain Rehab, P.C. (1.5 CEUs)

Refreshment Break—3:30-3:45 pm

3:45 pm - 5:15 pm

SESSION 5
Reasonable Value, Collateral Source, and Valuing Life Care Plans Based upon Medicare/Medicaid Pricing

Thomas R. Ireland Ph.D.
University of Missouri-St. Louis (1.5 CEUs)

PRESIDENT'S RECEPTION
Friday: 5:30-7:30 pm

San Diego Yacht Club, Spinnaker Room

REGISTRANT AND 1 GUEST INVITED.

* Get-together for Old Salts and New is for newer members, for members wanting input about sea changes in their existing practices, and for members who have advice and support to share.

SATURDAY, MAY 13th

8:15 am - 9:15 am

SCHEDULE CHANGE

SESSION 6
The Do's and Don'ts of Expert Testimony

Toni M. Blake JD MA
2nd Chair Services (1.0 CEU)

Refreshment Break—9:15-9:30 am

SATURDAY, MAY 13th *(continued)*

9:30 am - 11:00 am

SESSION 7
Roundtable on Calculating Household Services

Shannon H. Shipp Ph.D. CEA
Shipp, Needham & Durham LLC (1.5 CEUs)

Refreshment Break—11:00-11:15 am

11:15 am - 12:15 pm

SESSION 8
Employment Law

Carl Gann CDMS ABVE-D CLCP
Carl Gann & Associates, Inc. (1.0 CEU)

Taco Buffet—12:15-1:45 pm
(Spinnaker Room)

2:00 pm - 3:00 pm

SPEAKER CHANGE

SESSION 9
Lost Earnings Considerations for Business Owners

Robert J. Nelson MACC CPA CFF
HSNO (1.0 CEU)

Refreshment Break—3:00-3:15 pm

3:15 pm - 4:15 pm

SESSION 10
Vocational Apportionment Factors Affecting Employability and Earning Capacity

Eugene E. Van de Bittner
Ph.D. CRC ABVE-D IPEC
Mirfak Associates, Inc. (1.0 CEU)

Break—4:15-4:30 pm

ANNUAL BUSINESS MEETING
AND
2018 PLANNING SESSION
Saturday: 4:30-6:00 pm
ALL ARE INVITED!

9:00 AM - 5:00 PM

Refreshment Breaks: 10:15–10:30 am; 3:00–3:15 pm
Deli Counter Lunch Buffet: 12:00–1:30 pm

INTERMEDIATE BOOT CAMP

Back to Basics: Present Value Calculations

This boot camp session will focus on the three methods commonly used for discounting future losses to present value. The goal is for the participants to gain understanding of the U.S. Supreme Court language regarding the risk-free rate and the discounting methods discussed in the *Pfeifer* decision. We will discuss the similarities and differences among the methods and the mathematics involved when applying each one. Ultimately, we will compare the results achieved by each method. While emphasis will be given to the discounting process, the data used for determining earning capacity and how it might impact assumptions made for discounting will also be discussed. Should time allow, the sources and mathematics involved in discounting future medical and / or life care expenses to present value will be discussed.

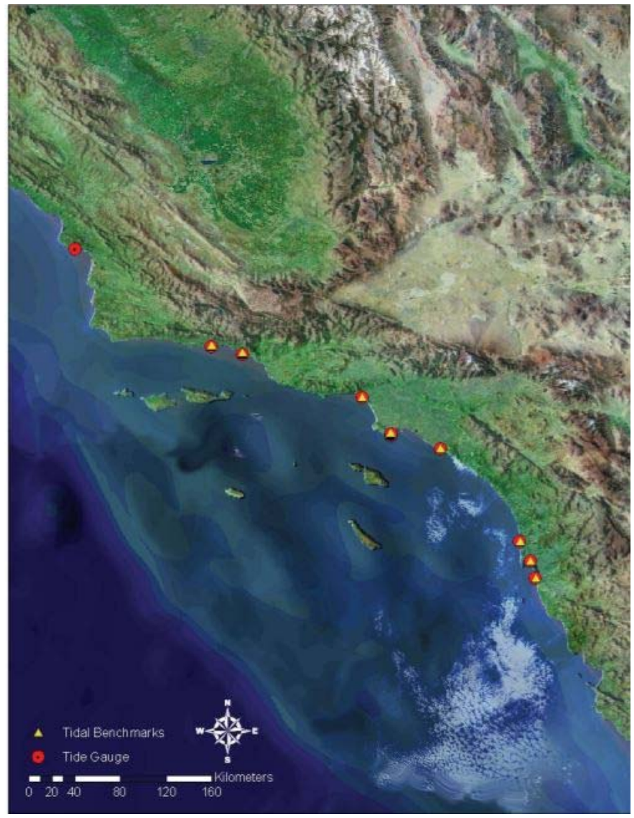
PRESENTER: Allyn B. Needham Ph.D. CEA
Shipp, Needham & Durham LLC

ADVANCED BOOT CAMP

Life Care Planning, Medical Price Forecasts, and the Present Value of a Life Care Plan

The purpose of this workshop is to outline and discuss the step-by-step process needed to determine the aggregate present value of a life care plan.

We will start with a brief discussion of life care planning. Most everyone attending this workshop recognizes that a basic life care plan includes a list of all the medical care goods and services recommended by a life care planner. We will begin with the question of who creates a life care plan and what determines its components. We will define the plan's objectives. From the life care planner's vantage point, the prices for medical goods and services are identified for the current year – the year when the plan was prepared. In the standard life care plan, prices in subsequent years are also in today's prices and will need to be adjusted upward periodically to reflect the expected impacts of



inflation on the future medical care budget. How does the earnings analyst decide what inflation's future looks like? At this point we will discuss the concept of inflation. We will discuss the variety of medical care prices indices developed by the U.S. Bureau of Labor Statistics. We will discuss how history may be used to provide insight into the future.

After a brief introduction and overview, we first tackle the job of finding a reasonable forecast of expected price changes (inflation) over the duration of the life care plan. Everyone recognizes that life care plans could cover any number of years, and we will strive to identify a plan that brings into the analysis a reasonable inflation rate.

Next, we tackle the matter of building a spreadsheet that allows for price forecasts in the plan.

Finally, we tackle the matter of determining the present value of future annual costs for medical goods and services.

PRESENTERS: Herb Burkman Ph.D.
J. Herbert Burkman & Associates | Economic Research

Carol Hyland MS CLCP CDMS
Hyland & Associates

FRIDAY, MAY 12th

SESSION 1 … 8:00 AM - 9:30 AM

Legal Guidance in the State of California: PI, WD, and Employment Cases

What differentiates you as a forensic expert (forensic vocational rehabilitation expert or a forensic economist) from other experts? Is your familiarity and adherence to the legal guidance controlling what your analysis should or should not consider? You should also know the various procedures that you are to follow in your forensic practice. You really do not want to piss off any Judge. This presentation will cover both State and Federal procedures.

PRESENTER: Barry Ben-Zion Ph.D.
Consulting Economist (1.5 CEUs)

Refreshment Break—9:30-9:45 am

SESSION 2 … 9:45 AM - 10:45 AM

Reasonable Costs for Personal Injury Cases in California

This session will cover: Language of Medical Billing; Auditing Standards; Usual & Customary Databases; Pricing Hospital Stays; Payments for Medical Services; and Reasonable Value.

PRESENTER: Tami Rockholt RN BSN
Rockholt & Associates LLC (1.0 CEU)

Refreshment Break—10:45-11:00 am

SESSION 3 … 11:00 AM - 12:00 PM

Current Status of Affordable Care Act As It Relates to Life Care Plans

- What the ACA is/was and why it might change the way we look at compensation in cases involving life care plans. In short – the ACA provides low cost insurance to people with pre-existing conditions with no way for insurers to exclude or charge more to injured persons and no obvious mechanism for subrogation.
- The legal difficulties to introducing ACA or any type of insurance program in litigation. The collateral source rule – what it is, how it does/doesn't affect life care plans, and whether the ACA or its replacement requires a rethinking of the rule.
- What to look for in any replacement plans as to whether they deserve to be further explored. Some types of "Trumpcare" might be just the same as the ACA in terms of how we might look at damages while others would totally eliminate consideration of insurance going forward.

PRESENTER: Victor A. Matheson Ph.D.
College of the Holy Cross (1.0 CEU)

LUNCH ON YOUR OWN—12:15-1:45 pm

SESSION 4 … 2:00 PM - 3:30 PM

Ethics in a Forensic Setting

Work in a forensic setting presents unique ethical dilemmas for vocational experts and economists, and along with these comes the potential for ethical compromise. *Ethics in a Forensic Setting* will focus on ethical best practices that can be applied to any discipline. This presentation will cover the importance of integrity and impartiality, avoiding conflicts of interest, navigating relationships inside and outside of the courtroom, maintaining competence, ethicality in fees and compensation, and the importance of privacy and confidentiality. The lessons to be learned are presented through real-life examples.

PRESENTER: Reg Gibbs *MS CRC LCPC CBIS CLCP FIALCP*
Rocky Mountain Rehab, P.C. (1.5 CEUs)

Refreshment Break—3:30-3:45 pm

SESSION 5 … 3:45 PM - 5:15 PM

Reasonable Value, Collateral Source, and Valuing Life Care Plans Based upon Medicare/ Medicaid Pricing

With respect to past medical expenses, the term “reasonable value” can refer to “amounts actually billed for medical treatments,” “amounts actually paid in full satisfaction of a plaintiff’s medical bills,” something else, or that both amounts billed and amounts paid. What can be presented to a jury? Why this matters with respect to past damages and why this is something different from whether or not the collateral source rule applies. What constitutes a collateral source? Can a “source” be collateral to itself? Is there a collateral source issue in the determination of how to measure reasonable value for past medical expenses? Is the reasonable value issue relevant to future medical expenses and life care plans? Do Medicare and Medicaid present special issues for life care plans?

PRESENTER: Thomas R. Ireland Ph.D.
University of Missouri-St. Louis (1.5 CEUs)

AREA's **Annual Business Meeting** will be held Saturday, May 13th (4:30-6:00 pm) in the Staff Commodore Room.

ATTENTION! There will be a table at the Friday evening, May 12th President's Reception for those interested in the **GET-TOGETHER FOR OLD SALTS AND NEW.** This gathering is for newer members, for members wanting input about sea changes in their existing practices, and for members who have advice and support to share.

SATURDAY, MAY 13th

SESSION 6 … 8:15 AM - 9:15 AM

The Do's and Don'ts of Expert Testimony

This presentation will cover tips learned from post trial interviews of jurors as to the most and least effective ways of delivering your testimony.

PRESENTER: Toni M. Blake *JD MA*
2nd Chair Services (1.0 CEU)

Refreshment Break—9:15-9:30 am

SESSION 7 … 9:30 AM - 11:00 AM

Roundtable on Calculating Household Services

This is an interactive, audience-driven roundtable on issues in calculating household services. Loss of household services may be the largest component of the total economic loss but is often the least understood and documented part. The purpose of the session is not to focus on a single method or dataset to calculate lost household services, but to think broadly about all the components that are necessary to make a defensible calculation. The session will begin with a short introduction to the topic and some of the issues that damages experts may encounter. The session will continue by soliciting opinions from the audience about those topics as well as others that the audience members have encountered in their practices.

PRESENTER: Shannon H. Shipp Ph.D. CEA
Shipp, Needham & Durham LLC (1.5 CEUs)

Refreshment Break—11:00-11:15 am

SESSION 8 … 11:15 AM - 12:15 PM

Employment Law

There are various types of employment law cases for which vocational and economic experts can be retained and testify. These case types will be discussed along with relevant vocational issues such as employment references, active job search, defamation, displaced workers, and bridge jobs. The session will provide an in-depth look at mitigation and its discovery. Case studies will be presented with group participation to develop vocational/economic forensic opinions.

PRESENTER: Carl Gann *CDMS ABVE-D CLCP*
Carl Gann & Associates, Inc. (1.0 CEU)

Taco Lunch Buffet—12:15-1:45 pm
(Spinnaker Room)

SESSION 9 … 2:00 PM - 3:00 PM

Lost Earnings Considerations for Business Owners

Mr. Wheat's presentation will discuss the financial data reported on tax returns for sole proprietors, partnerships and S corporations and the relevant information that should be considered in determining lost earnings for business owners.

PRESENTER: Robert J. Nelson *MACC CPA CFF*
Hagen, Streiff, Newton & Oshiro,
Accountants, PC (1.0 CEU)

Refreshment Break—3:00-3:15 pm

SESSION 10 … 3:15 PM - 4:15 PM

Vocational Apportionment Factors Affecting Employability and Earning Capacity

Vocational apportionment can impact an applicant's or plaintiff's employability and earning capacity. Medical factors and vocational factors affecting apportionment are discussed, Numerous recent court decisions regarding vocational apportionment are summarized. A new vocational apportionment process is presented.

PRESENTER: Eugene E. Van de Bittner
Ph.D. CRC ABVE-D IPEC
Mirfak Associates, Inc. (1.0 CEU)

Break—4:15-4:30 pm

All are invited!

SATURDAY—4:30-6:00 PM

ANNUAL BUSINESS MEETING & 2018 PLANNING SESSION

SPEAKERS AT A GLANCE

BARRY BEN-ZION Ph.D.
Consulting Economist • Santa Rosa, CA

TONI M. BLAKE J.D., M.A.
2nd Chair Services • La Mesa, CA

J. HERBERT BURKMAN Ph.D.
J. Herbert Burkman & Associates • Dallas, TX

CARL GANN CDMS, ABVE-D, CLCP
Carl Gann & Associates, Inc. • Tacoma, WA

REG GIBBS M.S., CRC, LCPC, CBIS, CLCP, FIALCP
Rocky Mountain Rehab, P.C. • Billings, MT

CAROL HYLAND M.S., CLCP, CDMS
Hyland & Associates • Lafayette, CA

THOMAS R. IRELAND Ph.D.
University of Missouri-St. Louis • St. Louis, MO

VICTOR A. MATHESON Ph.D.
College of the Holy Cross • Worcester, MA

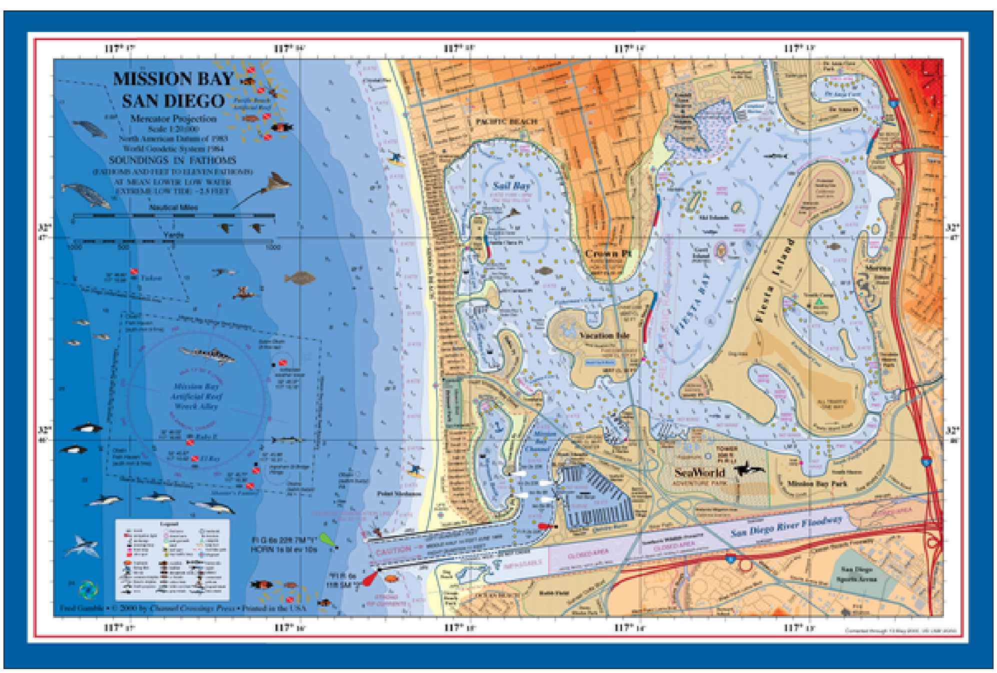
ALLYN B. NEEDHAM Ph.D., CEA
Shipp, Needham & Durham, LLC • Fort Worth, TX

ROBERT J. NELSON MACC CPA CFF
HSNO • Irvine, CA

TAMI ROCKHOLT RN, BSN
Rockholt and Associates LLC • Rock Hill, SC

SHANNON H. SHIPP Ph.D., CEA
Shipp, Needham & Durham, LLC • Fort Worth, TX

EUGENE E. VAN DE BITTNER Ph.D., CRC, ABVE-D, IPEC
Mirfak Associates, Inc. • Walnut Creek, CA



SPEAKER BIOGRAPHIES

Barry Ben-Zion

PhD

Main Conference Session 1
(Friday 8:00 am - 9:30 am)

Barry Ben-Zion, Ph.D. is a well known consulting economist specializing in providing forensic economic analyses for legal cases. Dr. Ben-Zion started working on legal cases in the early 1970's, and since that time has worked on thousands of legal cases for both the plaintiff and defense bar. He has testified in thousands of depositions and in approximately 1,000 trials in the Superior Courts and Federal Courts in California and several other states.

The role of an expert forensic economist is to present succinct and simplified explanations and information to allow the finder(s) of fact to reach a fair assessment of the economic damages sustained by a party as a result of the wrongful act by another.

Dr. Ben-Zion has presented testimony in personal injury, wrongful death, and wrongful termination, and in various commercial cases, be it breach of contract, antitrust, or alter-ego cases. He also provides valuations of businesses and professional practices and actuarial present value analyses of pensions in divorce cases.

Dr. Ben-Zion has been a Professional member of the American Rehabilitation Economics Association since 1994.

Toni M. Blake

JD, MA

Main Conference Session 6
(Saturday 8:15 am - 9:15 am)

Toni Blake is a Jury/Trial consultant from San Diego, California. She has worked as a psychology professor and a jury/trial consultant for more than 20 years. Ms. Blake has done tactical consulting, and selected juries for some of the largest civil cases in the country. Clients include Alcatel-Lucent Technologies, Discover Card Services and British Petroleum. In 2007 Ms. Blake selected the jury in Alcatel-Lucent v. Microsoft over the MP3 patent. The case resulted in the largest patent law verdict in US history, $1.52 billion.

J. Herbert Burkman

PhD

Boot Camp - Advanced Session
(Thursday 9:00 am - 5:00 pm)

Dr. Burkman founded J. Herbert Burkman and Associates in 1987 with a mission to produce compendious research and valuation reports for clients across the world. His clients have included businesses, labor unions, government agencies, and attorneys. Since the early 1990s, Dr. Burkman has prepared an average of 50 economic reports annually, and has offered testimony in deposition or trial on several hundred occasions. He has served as both a testifying and consulting economic expert with respect to economic damages in matters of personal injury, wrongful death, and employment discrimination. He has valued losses and gains to society (net social benefits) and changes in the status quo brought about by injunctive relief, and he has determined the economic value of contracts, lost profits, lost opportunities, as well as other forms of economic loss. He earned a Ph.D. in Economics in 1977 as a National Defense Education Act (NDEA) fellow at the University of Pittsburgh in Pittsburgh, PA, and has worked full-time as an economist since 1971. He is currently an Adjunct Professor of Economics at Southern Methodist University, Dallas, Texas, where he teaches Cost-Benefit Analysis and Monetary Policy.

Dr. Burkman has been a Professional member of the American Rehabilitation Economics Association since 1997.

Carl Gann

CRC, CDMS, ABVE-D, CLCP, IPEC

MAIN CONFERENCE SESSION 8
(SATURDAY 11:15 AM - 12:15 PM)

Carl Gann is a Rehabilitation Counselor and practices in Tacoma, Washington. He has been a rehabilitation counselor since 1978 following his Master's degree in Rehabilitation Counseling. He is a CRC, CDMS, ABVE-D, CLCP and IPEC.

Mr. Gann has been a Professional member of the American Rehabilitation Economics Association since 2011. Besides that, he's a really nice guy.

Reg Gibbs

MS, CRC, LCPC, CBIS, CLCP, FIALCP

MAIN CONFERENCE SESSION 4
(FRIDAY 2:00 PM - 3:30 PM)

Reg Gibbs is the founder and President of Rocky Mountain Rehab, P.C. of Billings, Montana as well as the co-founder and CEO of InQuis Global, LLC. He earned a BS in Psychology in 1992 from Eastern Montana College and a Master of Science in Rehabilitation Counseling in 1994 from Montana State University-Billings. A certified rehabilitation counselor, licensed clinical professional counselor, and certified brain injury specialist, Mr. Gibbs is also a certified life care planner and a fellow of the International Academy of Life Care Planners. Additionally, he is an instructor at the Institute of Rehabilitation Education and Training in Newberry, Florida. He was an adjunct professor of rehabilitation counseling at Montana State University-Billings for thirteen years and an expert witness for the Social Security Administration for seven years.

Carol Hyland

MS, CLCP, CDMS

BOOT CAMP - ADVANCED SESSION
(THURSDAY 9:00 AM - 5:00 PM)

Carol Hyland is a Rehabilitation Counselor, Consultant, Certified Life Care Planner and Certified Disability Management Specialist with more than 40 years of experience working with individuals with disabilities, assisting them in living as independently as possible in the community and in obtaining, retaining and preparing for employment.

Ms. Hyland has an undergraduate degree from the University of California, Irvine, a Master's Degree from the Graduate Theological Union in Berkeley and a Master's in Rehabilitation Counseling from California State University in San Francisco.

In addition to a private practice focused on worker's compensation rehabilitation, private case management and litigation consultation, Ms. Hyland has worked for the State of California Department of Rehabilitation as a Rehabilitation Counselor, Senior Rehabilitation Counselor, Rehabilitation Supervisor and Rehabilitation Administrator. She managed 132 staff, 72 Rehabilitation Counselors and multiple community based programs in a three county area of Northern California. Ms. Hyland has testified on life care planning and vocational rehabilitation issues on numerous occasions and in multiple jurisdictions.

Thomas R. Ireland

PhD

MAIN CONFERENCE SESSION 5
(FRIDAY 3:45 PM - 5:15 PM)

Dr. Ireland earned his B.A. in economics from Miami University (1964) and his Ph.D. in Economics from the University of Virginia (1968). He taught at Loyola University, Purdue University (Calumet Campus), Illinois State University, the University of Wisconsin (Milwaukee) before becoming a tenured economics professor at the University of Missouri at St. Louis after 1972. He has been a professor emeritus at that university since 2003. He has been an author or editor of 13 books, 145 papers, and several sections in other books. He is the past president of the American Academy of Economic and Financial Experts (AAEFE), past president of AREA, and past vice president of the National Association of Forensic Economics (NAFE). He has also been an associate editor of the *Journal of Forensic Economics* and remains on the Editorial Board of the *Journal of Legal Economics*, and was acting editor of *The Earnings Analyst* for one year. He has consulted with attorneys and acted as an expert witness in the areas of personal injury, wrongful death, and the damages portions of wrongful termination from 1974 to the present and has testified in deposition or trial at the federal or state level in approximately 25 states.

Victor A. Matheson

PhD

MAIN CONFERENCE SESSION 3
(FRIDAY 11:00 AM - 12:00 PM)

Dr. Matheson specializes in sports economics, specifically the economic impact of "mega-sporting events" on host cities; public finance; the economics of lotteries and gambling; and natural resource economics. In particular, his sports economics research, which dispels the notion that major events (such as the Olympics, World Series and Super Bowl) and new sports infrastructure (such as stadiums or arenas) provide large economic dividends for host cities have made him a widely sought-after expert.

He has provided expert commentary to dozens of media outlets including *The New York Times, National Public Radio, The Boston Globe*, *ESPN,* the Associated Press*, CBS Evening News,* American Public Media's *Marketplace, CNN*, and MSNBC.com, among others. Dr. Matheson is the author of over 80 scholarly articles or book chapters on a wide variety of topics. During Chicago's bid for the 2016 Summer Olympics, he published an op-ed in *The Chicago Tribune* titled "Bid's rejection could be for the best" and *The New York Times* republished his earlier op-ed about New York's bid for the 2012 Summer Games, titled "Luck of the Draw." During the 2014 World Cup in Brazil, Nate Silver's fivethirtyeight.com published his economic analysis of the country's new soccer stadiums.

Allyn B. Needham

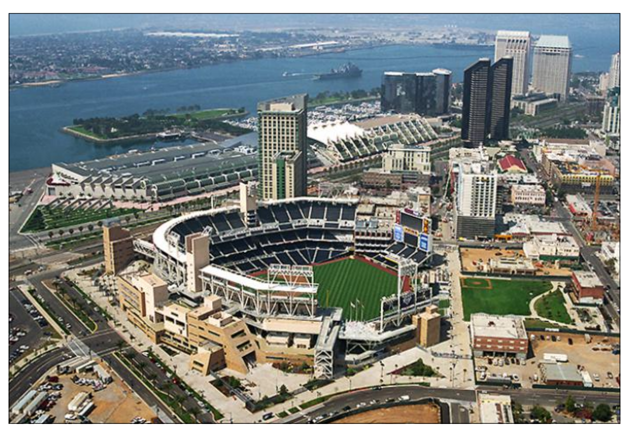
PhD, CEA

INTERMEDIATE BOOT CAMP
(THURSDAY 9:00 AM - 5:00 PM)

Allyn Needham, Ph.D., CEA, is a principal at Shipp, Needham & Durham, LLC (Fort Worth, Texas). He is beginning his twentieth year of working in the area of litigation support. Prior to that, he worked in the area of banking and risk management. Dr. Needham has also been an Adjunct Professor of Economics at Texas Christian University and Weatherford College. As an expert, he has testified on various matters relating to commercial damages, personal damages, business bankruptcy and business valuation. He has been retained by attorneys representing plaintiffs and defendants, debtors and creditors. He has given expert testimony in state and federal courts.

Dr. Needham is active in several national economic associations. He has served as President of the American Economic Rehabilitation Association, the Collegium of Pecuniary Damages Experts and the Southwestern Society of Economics. He has published numerous articles in the area of forensic economics and provided continuing education presentations at professional economic, vocational rehabilitation and bar association meetings He has provided webinars for the National Association of Certified Valuators and Analysts and the International Association of Rehabilitation Professionals – Forensic division.

Dr. Needham has been a Professional member of American Rehabilitation Economics Association since 1999 and has been a Certified Earnings Analyst since 2000.



Robert J. Nelson
MACC, CPA, CFF

Main Conference Session 9
(Saturday 2:00 pm - 3:00 pm)

Robby Nelson received a Bachelor's and a Master's degree in accounting from Brigham Young University. After working at Ernst & Young as an auditor, Mr. Nelson became a forensic accountant at Hagen, Streiff, Newton & Oshiro. Mr. Nelson has experience providing litigation support services and forensic accounting, including the computation of loss of profit and earnings, profit and earnings projections, personal injury, wrongful termination, alter-ego suits, fraud examinations, tracing employee theft and the review of insurance claims, property damage, extra expense, and business interruption.

Mr. Nelson has also assisted with a number of business valuations that have been utilized for family law matters. Mr. Nelson has experience tracing assets, analyzing expenses, reviewing financial records and identifying information pertinent to the engagement.

Tami Rockholt
RN, BSN

Main Conference Session 2
(Friday 9:45 am - 10:45 am)

Ms. Rockholt is a Registered Nurse Consultant with a broad clinical background that includes trauma, intensive care, critical care and emergency room. She has more than 20 years of experience reviewing and auditing medical bills and has qualified as an expert in six states including California.

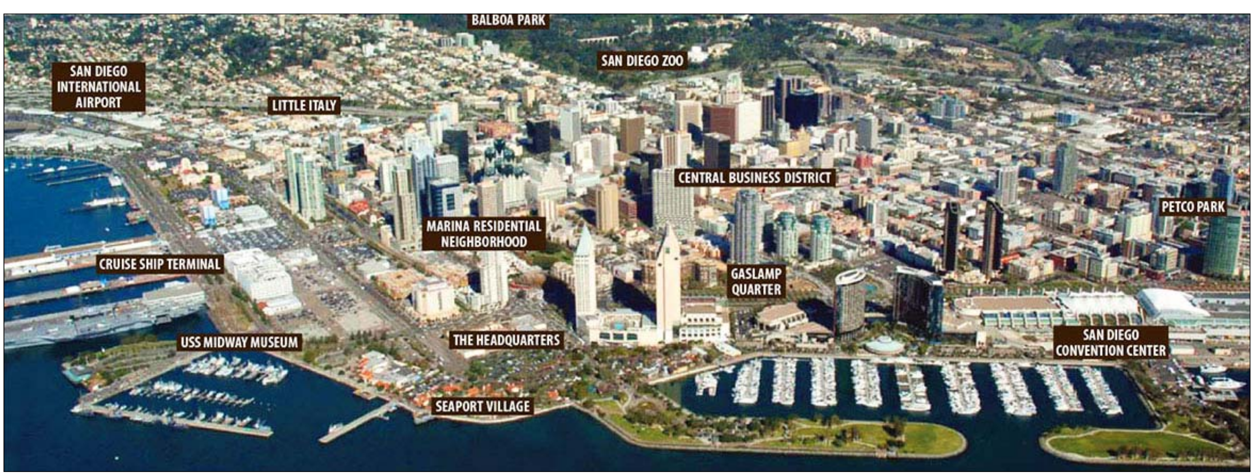
Shannon H. Shipp
PhD, CEA

Main Conference Session 7
(Saturday 9:30 am - 11:00 am)

Dr. Shipp is a partner at Shipp, Needham & Durham, LLC. He is also Associate Professor of Marketing at the M.J. Neeley School of Business at Texas Christian University. Dr. Shipp has been a consultant and expert witness for over 20 years. During that time, Dr. Shipp has testified on such subjects as business valuation, liability, and economic damages including lost profits, lost earnings, and lost benefits. He has also testified in cases involving wrongful death, wrongful termination, personal injury, medical malpractice, divorce, commercial litigation, antitrust, wrongful termination of distribution agreements, and failure to exercise best efforts in promoting a new product. Dr. Shipp has been retained by attorneys for plaintiffs and defendants in both state and federal courts.

Dr. Shipp actively participates in regional and national associations that consider matters relating to the calculation of economic damages. He has also completed continuing education in business valuation. Dr. Shipp co-authored a chapter on the calculation of economic damages in Practitioners Publishing Company's *Guide to Litigation Support Services*. He also led a team that developed software sold through Practitioners Publishing Company that is used to calculate economic damages arising from personal injury, wrongful death, and wrongful termination cases.

Dr. Shipp has been a Professional member of American Rehabilitation Economics Association since 1999 and has been a Certified Earnings Analyst since 2000.



Eugene E. Van de Bittner

PhD, CRC, ABVE-D, IPEC

Main Conference Session 10

(Saturday 3:15 pm - 4:15 pm)

Eugene E. Van de Bittner, Ph.D. has a B.S. degree in business administration, an M.Ed. degree in vocational rehabilitation, and a Ph.D. degree in rehabilitation. He is a certified rehabilitation counselor, a certified life care planner, a certified vocational expert, and a certified international psychometric evaluator. He served as president of the California Association of Rehabilitation and Reemployment Professionals (CARRP) in 1983. He was president of the American Board of Vocational Experts in 1997. He has also served on the Ethics Committee of CARRP and ABVE and currently serves on the Credentials Committee for ABVE.

Dr. Van de Bittner was the managing editor of a special issue of the *Journal of Forensic Vocational Analysis* in 2003 in which several vocational experts researched and reported on the use of vocational expert opinion and testimony in their respective state workers' compensation systems. He is the author of several peer-reviewed, published journal articles related to the evaluation of employability and earning capacity. Dr. Van de Bittner was the co-editor of a special issue of *The Rehabilitation Professional* in 2012 regarding diminished future earning capacity. He is the author of Chapter 18, Consultation in Workers' Compensation Law in *Foundations of Forensic Vocational Rehabilitation* (2014), a textbook that is used in graduate rehabilitation counselor training programs. He is the author of a recent article on vocational apportionment in workers' compensation and civil cases. He has testified at the Workers' Compensation Appeals Board throughout northern California, as well as at Superior Court in California, and at U.S. District Court. He is a frequent invited presenter on topics related to employability and earning capacity.

Dr. Van de Bittner has been a Professional member of American Rehabilitation Economics Association since 1997.

Hotel Information

The Bay Club Hotel is located approx. 3 miles from the San Diego International Airport and less than a mile from the San Diego Yacht Club at 2131 Shelter Island Drive, San Diego, CA 92106. Phone number is 619.224.8888.

➔Free 6-passenger ON-CALL SHUTTLE from the airport. Call the hotel when you are almost ready to be picked up. (Schedule your return shuttle at the front desk.)

HOTEL PRICING

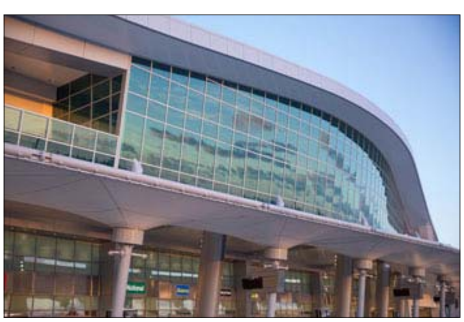
A block of rooms has been reserved for AREA Conference attendees at a rate of $129/weekday night* and $139/ weekend night* for a single/double guestroom. *Triple, quadruple, and suites may also available. However, the Bay Club Hotel & Marina does not guarantee specific room types. Requests will be accommodated to the best of the Hotel's ability.*

All rates are subject to the prevailing city and state taxes. Currently, taxes total 10.5% and are subject to change. All rates are subject to a 2% San Diego Tourism Marketing Assessment. AREA's group rate includes parking, airport shuttle, complimentary WiFi and *USA Today* Monday-Friday.

HOTEL RESERVATIONS

Group attendees will secure room reservations on an individual basis. For room reservations, please call the Bay Club Reservation Line at 800-672-0800 or 619-224-8888. Please identify yourself as part of the AREA group at the time you make your reservation in order to be eligible for the special group rate. An advance deposit or credit card guarantee is due at time of reservation. Reservations received after April 10, 2017 will only be accepted on a space available basis. If the group rate is not available after the cut-off date, the prevailing rack rates will apply.

Reservations received after April 10, 2017 will only be provided on a space available basis and are available for the dates May 10-14. Check-in time is after 4:00 pm on the date of arrival; check-out time is before 12:00 noon on the day of departure. Early check-in and late check-out are provided based upon availability, and arrangements must be made with the Front Desk and some charges may apply.



Transportation Information

SAN DIEGO INTERNATIONAL AIRPORT, which has two terminals, is conveniently located near downtown San Diego. Click here for complete flight information.

Taxicabs: Taxis depart from the designated taxi zones located at the airport's transit islands, on the Arrivals/Baggage Claim Level adjacent to each terminal. Many companies provide taxicab service at San Diego International Airport. If you need a taxi, simply follow the signs leading to the Transportation Plazas. A Customer Service Representative will place you with the first available taxi, unless you specify a particular taxicab company.

This guide lists taxicab radio/dispatch services in San Diego. Call directly or use the Web links to find the taxicab service that best suits your needs. Please refer to a San Diego phone book yellow pages for a complete list of taxicab services.

Airport Shuttles:

On Airport—No matter where you park at San Diego International Airport, you're never far from your gate. The airport's customer-friendly parking shuttles continually loop between the airport's parking lots and the terminals 24/7. Each parking shuttle is color-coded to match the parking lot it serves: Green for the Long Term Lot 1 on Harbor Drive, and blue for the Economy Lot on Pacific Highway. The shuttles feature eye-catching San Diego-themed graphics, low floors, kneeling capabilities and wheelchair lifts. And all of them run on propane.

Off Airport—Shuttle vans and buses operated by off-airport companies are another transportation option. Shuttle service is available at the Transportation Plazas across from Terminals 1 & 2.

From Terminal 1, cross the skybridge and take the escalators or the elevators to street level. From Terminal 2, use the pedestrian crosswalk conveniently located outside the Terminal 2 Baggage Claim Area to access the Transportation Plaza. A Customer Service Representative will place you with the first available shuttle, unless you specify a particular shuttle company.

This guide lists shuttle companies frequently used by travelers. Call directly or use the Web links to find the shuttle that best suits your needs. Policies, services and rates are subject to change and may vary based on destination and passengers.

Assistance can be provided for passengers with disabilities. For this service, it is highly recommended that you contact and coordinate with the shuttle company in advance.

Car Rental: Effective, January 20, 2016, all car rental pick-ups and drop-offs for rental car companies serving San Diego International Airport will occur at the new Rental Car Center. Free dedicated shuttle busses will run continually to ferry customers between the airport terminals and the Rental Car Center.

Continuing Education Credit

Application will be made for up to 12.0 contact hours (including 1.5 ethics credit) for the main conference and up to 6.0 contact hours for the boot camp for the following credentials:

- ABVE
- CCM
- CDMS
- CLCP
- CRC
- CVE

CEUs are also available for AREA's CEA/CRE credentials.

AREA will be applying for **1.5 ethics credit** from CRCC and CDMSC for Session 4 of the main conference.

IMPORTANT REMINDER: Those holding a CEA and/or CRE must attend at least one (1) AREA conference every three (3) years in order to recertify. *Upon written request, CEAs and CREs may ask for a one-time one-year extension of this requirement for a fee of $100.*

The **American Rehabilitation Economics Association** is an association of vocational, economic, rehabilitation, and life care planning professionals, with members throughout the United States, Canada and the Virgin Islands.

AREA has two **missions**:

- Recognizing the **integrative use** of vocational rehabilitation and economic loss assessment as a distinct discipline, and
- Providing a **peer-exchange forum** for vocational, economic, rehabilitation, and life care planning experts.

Established in 1989, AREA is the only **international certifying body** that has this unique blend of professions in loss assessment. AREA is the first professional association to establish a Registry of both Forensic Vocational and Forensic Economic Experts.

As forensic experts, AREA members offer opinion and testimony in a wide variety of cases. Often they involve some type of injury, which has resulted in an alleged loss of earnings or loss of earning capacity.

Our role is to determine the nature and extent of any loss, from a vocational and/or economic perspective. This, in turn, helps the Court in its assessment of damages.

Economic and vocational experts identify what the person could have earned prior to the incident, compared to what they are likely to earn following the incident. Economic experts calculate the value of those earnings over time, so the difference, if any, between the two income streams is clearly understood. Those who act as vocational/economic experts blend the two disciplines, and offer testimony in both arenas.

Personal injury, medical malpractice, product liability, wrongful death, wrongful termination, and discrimination in employment form the bulk of the cases evaluated for vocational and economic loss by AREA members. Life care planning, marital dissolution, Social Security disability, maritime, railroad, ADA, and workers compensation casework are additional member specialties. www.a-r-e-a.org

AREA Membership Information

AREA members generally hold at least a Masters degree in a vocational, economic or related field *(not required for Associate membership or Student membership)*. The majority of members have several national certifications and/or state licenses in their specialization. Most are active in other forensic organizations, and many have published or taught in vocational/economic fields.

A 10% DISCOUNT OFF ALL 1ST YEAR DUES WILL APPLY, UPON MEMBERSHIP APPROVAL. (FIRST-TIME MEMBERS ONLY.)

Categories of membership:

- Professional Members ($155)
  - Certified Members: CEA
    ($505, includes 1st year of Professional membership dues)
  - Registered Members: FVE, RFE
    ($305, includes 1st year of Professional membership dues)
- Associate Members ($155)
- Student Members ($25)

AREA invites all qualified candidates to submit an application for membership.

Just follow these simple steps:

- Download our Application Procedures
- Download the Membership Application
  1. Complete and return the application with the requested documents.
  2. Enclose the appropriate fee for the membership category you choose.
- Download our Confidential Documents Preference form
- Download our Code of Standards & Ethics

AREA

We welcome your interest in the American Rehabilitation Economics Association.

AREA

2017 Conference Registration Form (ONE FORM PER REGISTRANT PLEASE)

Charting Your Course for Success

SAN DIEGO YACHT CLUB - SAN DIEGO, CALIFORNIA • MAY 11-13, 2017

INFORMATION FOR BADGE & CONFERENCE PACKET REGISTRANT LIST. ***(Please print or type.)***

FIRST NAME MIDDLE INITIAL LAST NAME HIGHEST DEGREE | CREDENTIALS

PROFESSIONAL TITLE COMPANY NAME

ADDRESS CITY

STATE/PROVINCE ZIP/POSTAL CODE COUNTRY (if not U.S.)

OFFICE # CELL # ☐ CHECK IF YOU DON'T WANT THIS NUMBER PUBLISHED IN THE LIST OF ATTENDEES. FAX # ☐ CHECK IF YOU DON'T WANT THIS NUMBER PUBLISHED IN THE LIST OF ATTENDEES.

E-MAIL FIRST NAME FOR BADGE

Conference materials will be provided to attendees via website access (alternate means by thumb drive). *Attendees are encouraged to bring laptops.*

SPECIAL NEEDS? Let us know and we will do our best to accommodate you: ____________________

Check all boxes for which CEU's are requested: ☐ ABVE ☐ CDMS ☐ CEA/CRE ☐ CLCP ☐ CRC ☐ CVE

MAIN CONFERENCE REGISTRATION

Click here for complete AREA membership information.

*To qualify for the AREA member registration fees, you must be a member of AREA when you register for and attend the Conference, or include a completed membership application & make full payment herewith. A 10% DISCOUNT OFF 1ST YEAR DUES WILL APPLY UPON APPROVAL OF MEMBERSHIP. (FIRST-TIME MEMBERS ONLY.)

	Early-Bird Registration **No later than 04/14/17**	**After 04/14/17**
AREA Member*	☐ $275	☐ $325
Non-Member	☐ $350	☐ $400
Special Guest [a]	☐ $175	☐ $200

[a] "Special Guest" is defined as an AREA professional focus spouse or companion. This registration category includes admission to social functions and participation in conference sessions with a spouse or companion, but excludes Continuing Education Units. All member-eligible spouses/companions are limited to three conferences at this rate before full non-member registration is expected.

BOOT CAMP REGISTRATION

The Boot Camp is NOT included in the Main Conference registration fee.

Please indicate which BOOT CAMP you wish to attend: ☐ INTERMEDIATE— "Back to Basics: Present Value Calculations" ☐ ADVANCED— "Life Care Planning, Medical Price Forecasts, and the Present Value of a Life Care Plan"

	Early-Bird Registration **No later than 04/14/17**	**After 04/14/17**
AREA Members and Non-Members	☐ $450	☐ $500

CLICK HERE to pay your conference registration fees through PayPal.

DISCOUNTS AVAILABLE! **Members** registering for both Main Conference AND Boot Camp: **Deduct $150** from total registration fee.
Non-members registering for both Main Conference AND Boot Camp: **Deduct $50** from total registration fee.

PAYMENT INFORMATION

Make checks payable to "AREA." CLICK HERE to pay by credit card through PayPal.

Refund Policy: Cancellations must be made *in writing* and emailed or mailed to the AREA office *for receipt* according to the following schedule. There are no refunds for no-shows. *Any requests for refunds of room reservations must be made directly with the hotel at which you are staying.*

On or before April 14, 2017	Between April 21 and April 30, 2017	After April 30, 2017
FULL REFUND	REFUND LESS $75	NO REFUND

Step 1: **EMAIL OR FAX** COMPLETED REGISTRATION FORM TO: **area@gasvcs.net** • **FAX 619.839.3817**

Step 2: **MAIL** YOUR CHECK OR MONEY ORDER TO: "AREA," PO BOX 19941, SAN DIEGO, CA 92159
or **PAY ONLINE** THROUGH PAYPAL

Registration form dated 2/28/17

QUESTIONS? 800.317.2732 • 619.440.2650 • area@gasvcs.net