PROGRAM ABSTRACTS FOR AREA CONFERENCE SESSIONS 2025

Concurrent Boot Camps

Intermediate Boot Camp *(concurrent with Advanced Boot Camp)*

Assessing Personal Damages: Facts, Resources, and How to Use Them

Dr. Allyn Needham, Shipp Needham Economic Analysis, LLC

This workshop will discuss how to calculate the lost earnings and lost earning capacity or lost economic support for injured or deceased individuals. Its primary focus will be on reviewing the facts of a case and considering the data sources to be used in completing a personal damages report. The session will review methodologies and approaches used for assessing the losses incurred by traditional wage or salary workers and self-employed individuals. We will discuss analyzing W-2s, K-1s, and 1099-NECs along with paystubs and employer provided income projections.

At the end of the workshop, attendees will be able to assess the data needed for analyzing the injured person's lost earning capacity, calculate the injured person's losses, discount future losses to present value, and explain the rationale and methods used in arriving at the loss estimates.

The goal of this session is to prepare the attendees to not only be able to estimate lost earnings or lost earning capacity but also successfully defend their work through their understanding of commonly used techniques.

At the end of this session, the attendees should be able to

1. Calculate lost earning capacity for a wage or salaried injured person.
2. Explain the reasoning behind the calculations and the use of certain data sources for calculating such estimated losses.
3. Respond to questions regarding the methodology and sources used in making such calculations and why the conclusions are reliable and relevant to the litigation.

Concurrent Boot Camps *(cont'd)*

Advanced Boot Camp *(concurrent with Intermediate Boot Camp)*

Valuing the Unknown: Strategies for Complex Cases with Limited Data

Dr. Charlotte Otabor, Otas Economic Consulting, LLC

In high-stakes litigation, not every case comes with clean spreadsheets and comprehensive disclosures. This advanced session tackles the real-world challenges forensic economists face when working with incomplete, unreliable, or foreign-sourced data—especially in business valuation, wrongful death, or lost earnings cases involving international claimants or undocumented financial histories.

Through practical case studies, Dr. Charlotte Otabor will walk attendees through structured approaches to valuing businesses and economic losses when standard documentation is lacking. Topics include using proxy benchmarks, adapting models to culturally or jurisdictionally unfamiliar contexts, and justifying assumptions under scrutiny. Attendees will gain strategies for navigating sparse or unconventional data environments while preserving methodological rigor.

Whether you're assessing a small enterprise with no financials, estimating damages for a claimant paid in cash, or working across borders where standards differ—this session offers concrete tools, defensible frameworks, and lessons learned from the field.

Ideal for experienced practitioners ready to deepen their toolkit for complex, messy, or cross-border cases.

By the end of this session, participants will be able to:

- Consider ways to approach valuation and damages when conventional records are thin or missing.
- Explore framing questions and assumption-setting that might help at the outset of low-data matters.
- Get a sense of how courts tend to view "reasonable certainty" versus speculation, and how that may shape method choices.
- Experiment with proxy and substitute information (benchmarks, interviews, remittances, time-use/lifestyle indicators) to approximate earnings or cash flows.
- Walk through illustrative scenarios (e.g., microbusiness without financials; cross-border, cash-based income) to see what could work in practice.
- Sketch reporting and Q&A approaches when estimates rely on ranges, layered assumptions, and alternative paths considered.

Main Conference ***– Friday, October 10, 2025***

AI: Tricks, Treats, and Tech – Don't Be Scared, Be Prepared!
Unmask the mysteries of AI and discover how to make it work for you.

Kristen Baginski, LexisNexis

Join us for a fun and informative session where we'll demystify artificial intelligence and explore the tools and technologies that are transforming the way we live and work. Whether you're curious, cautious, or completely new to AI, this session will help you:

- Understand what AI really is (no spooky jargon!) — Learn what an LLM is and how they work.
- Discover popular AI tools and how they're being used today — A look at tools like ChatGPT, Co-Pilot, Lexis Protégé and more.
- Learn practical tips to integrate AI into your daily life and work — How can and should you be using AI to complete tasks and leave more time for important work.
- Feel confident and prepared to embrace AI with curiosity—not fear

Treat yourself to knowledge, uncover the tricks behind the tech, and leave empowered to make the most of AI in your world.

After this session you will be able to:

1. Have a high level understanding of how Gen AI works through understanding what an LLM is and how they work to answer your questions.
2. Understand the differences between various Gen AI tools and which tools are best utilized for various work scenarios
3. Learn the best use cases for integrating Gen AI into your workday and life while ensuring client confidentiality while also learning good prompting tips to get the best answers from the Gen AI tool.
4. Continue learning about Gen AI beyond the session.

Main Conference – *Friday, October 10, 2025* *(cont'd)*

Boo! What Makes *YOU* an Expert?!!!

Dr. William Houston Reed, Vocational Expert Witnesses

Ever since lawyers have been calling witnesses in court to give opinion testimony on scientific, technical, or in some other specialized field, the legitimate question on the minds of opposing counsel, the judge and the jury is, **"what makes this person an expert?"**

Nobody likes to be challenged to justify their value and especially not in a live public forum like a courtroom! Add to that tense setting the fact that opposing counsel will use accusatory questions to try to discredit you, or at least to make your responses seem that even you are not too sure as to just how well qualified you are in comparison to others, and you have a potentially **"*scary*" situation**.

"But don't be scared, be prepared."

Because once you realize what state and federal laws actually require (and don't require) for one to be considered an expert, you'll be prepared to confidently say that your education, training, and experience give you the appropriate knowledge and skills required by law to give expert opinion testimony.

Comparisons mean nothing! You don't have to prove that you are "THE expert in the country" to be qualified to give opinion testimony in court. You just need to know how to identify the relevant factors of a case and apply appropriate data to those factors by utilizing reliable principles and methods. If you do so, you can confidently state that you are an expert with specialized knowledge that can be helpful to the trier of fact. **This presentation will help you to realize that you are qualified according to law!**

After this session, the learner will be able to identify and define how various entities (*i.e.*, court jurisdictions, professional organizations, etc.) describe expertise in a subject or discipline, and how to verify and communicate that their credentials qualify them as an expert.

Main Conference ***– Friday, October 10, 2025*** *(cont'd)*

ORS Workscape Analytics™ Specifically Applied to Cases

John Yent, Workscape Analytics

This presentation is for learning about the Occupational Requirements Survey (ORS) and related data sets from Bureau of Labor Statistics (BLS) as an essential tool in your practice. The benefits of Workscape Analytics™ software will demonstrate ORS, understanding applications the applications to case management and forensic services. Using client's Residual Functional Capacity (RFC) users can optimize and expedite vocational profiles for assessments that are bullet-proof.

By the end of this session, participants will be able to:

1. Participants will understand overview of ORS and applications to rehabilitation case management and vocational expert services.
2. Participants will learn how to use the four ORS requirements categories to estimate RFC: Physical Demands, Education & Experience, Cognitive & Mental, as well as Environmental requirements.
3. Participants will learn how to understand, calculate, explain, document and provide testimony ORS results.
4. Participants will see demonstrations of Workscape Analytics technology and resources to accomplish practice goals and improve outcomes.

Integrating Artificial Intelligence in Damages Reports

Christopher Skerritt, Kincaid Wolstein Educational & Rehabilitation Services

This session examines how AI can enhance the precision, efficiency, and defensibility of economic and life-care planning reports. Participants will explore practical AI tools for automating data collection (*e.g.*, wage databases, medical-cost indices), applying natural-language processing to extract treatment needs from medical records, and leveraging predictive modeling for future-cost projections. Through case studies, we'll demonstrate best practices for validating AI outputs, ensuring transparency in assumptions, and addressing ethical considerations under Daubert standards.

By the end of this course, participants will be able to:

1. Describe three AI-powered techniques for streamlining vocational and life-care data gathering.
2. Evaluate model accuracy and bias in AI-generated cost projections.
3. Apply a structured validation process to document AI-derived findings in expert reports.

Main Conference ***– Friday, October 10, 2025*** *(day concludes)*

Handling Sexual Assault-Special Damages

Jason Purinton, Purinton Analytics, LLC

This presentation explores the vocational impact of sexual assault within the context of forensic evaluation and litigation support. It addresses how trauma may influence work capacity, career trajectory, and economic damages without crossing into mental health causation. Attendees will gain insight into structured methodologies for evaluating earning capacity in complex, sensitive cases.

By the end of this course, participants will be able to:

1. Identify key vocational and economic factors affected by sexual assault, including work capacity, career disruption, and long-term earning potential.
2. Distinguish the vocational expert’s role from that of clinical professionals when evaluating trauma-related cases.
3. Apply structured, defensible methodologies to assess vocational damages in cases involving sexual assault or trauma histories.
4. Recognize ethical considerations, scope limitations, and best practices for handling sensitive subject matter in forensic evaluations.

Main Conference – *Saturday, October 11, 2025*

The Relationship Between Unemployment and Demographic Characteristics: Implications for Estimates of Earning Capacity

Dr. Lane Hudgins, Lane Hudgins Analysis

This presentation reviews key findings from the literature on how unemployment rates in the United States vary by demographic characteristics, including sex, age, education, race, marital status, and wage levels. Drawing from national data sources and peer-reviewed studies, the presentation explores both structural and cyclical factors that contribute to employment disparities. Additional focus is given to occupational differences, labor force participation, and re-employment prospects, with particular attention to how unemployment data can be practically incorporated into earning capacity assessments.

1. **Understand demographic influences on unemployment**
   Participants will be able to describe how unemployment rates in the U.S. differ across demographic groups such as sex, age, education, race, and marital status, and identify structural and cyclical factors contributing to these disparities based on unemployment data and peer-reviewed research.
2. **Evaluate implications for worklife and earning capacity**
   Participants will learn how unemployment probabilities interact with labor force participation, and personal characteristics, and how these factors may influence estimates of expected worklife in forensic economic and vocational assessments.

Consumption Across Household Types

Dr. Christopher Mann, University of Nebraska – Lincoln and Rosenbaum Economic Consulting

The COVID-19 pandemic disrupted the estimation of many tables relied upon by forensic economists. We present the first estimates of personal consumption across different household types using post-pandemic, US micro data, their differences with past estimates, and how they should be used. Our estimation also includes household types that have historically been excluded, including single parents, same-sex couples, those with adult children, and those living with non-family adults.

By the end of the presentation, participants will be able to:

1. Explain the key methodological differences between Personal Consumption Expenditure (PCE) estimates in the literature.
2. Select the appropriate PCE table based on household characteristics, and determine an appropriate approach when the household does not align with a defined category.
3. Apply the PCE tables and regression estimates for loss calculations in wrongful death casework.
4. Evaluate the impact of using the updated and expanded tables versus prior versions on the accuracy and defensibility of economic loss estimates.

Work-life Expectancy and the LPE Method

Dr. William Rogers, John Ward Economics, LLC

Summarizing a person's expected future work-life into a single statistic comes at a price, especially when estimating remaining lifetime earnings. Dr. Rogers will provide a conceptual framework, using a Markov process, illustrating various work-life expectancy techniques identified in economic literature and their trade-offs concerning ease of use and forecast accuracy. The presentation will outline the steps to convert annual probabilities of labor force participation to generate their own lifetime annual work probabilities. Examples are constructed using simulated and survey data.

By the end of the presentation, participants will be able to:

- Review the Markov process concerning work-life expectancy.
- Identify different work-life estimators and how they deviate from the unbiased rate.
- Generate custom annual work-life risk probabilities.

Ethics When You Are Not Paying Attention

Jeroen Walstra, Walstra Expert Witness Company
Judith Parker, OSC Vocational Systems, Inc.

This presentation explores nuanced and often overlooked ethical dilemmas. Anchored in the evolving standards of AREA, the session delves into topics such as emerging regulations around harassment, whistleblower protections, and AI integration. Attendees will examine the responsible use of AI in reporting, including the tension between algorithmic "efficiency" and human nuance. The session challenges practitioners to reexamine assumptions around lingering client relationships, expert shopping, anonymous online attacks, and personal bias in economic evaluations. Additional focus is placed on complex scenarios like handling confidential information from unrelated sources and interpreting missing data points. Designed to raise awareness of ethical blind spots, this presentation encourages greater professional accountability—especially when attention is fragmented or assumptions are unchecked.

By the end of the presentation, participants will be able to:

1. Identify key professional standards established by the American Rehabilitation Economics Association (AREA), including recent updates and rules in development.
2. Analyze ethical considerations surrounding the integration of artificial intelligence in economic evaluations, particularly in the context of personal injury and wrongful death cases.
3. Distinguish between AI-driven "efficiency" and the nuanced responsibilities of human judgment in forensic economic analysis.
4. Evaluate common challenges in projecting future economic losses, including optimistic bias and incomplete client data.
5. Discuss the implications of client continuity, expert shopping, and professional boundaries in wrongful death evaluations.
6. Recognize the influence of personal bias in economic assessments and apply strategies to mitigate its impact on valuation integrity.

<u>*Main Conference*</u> *– Saturday, October 11, 2025* *(day concludes)*

The Perils of Paralysis; a Family Trauma

John Berg, Vocational Consulting, Inc.

This 90-minute presentation is to both educate other experts, vocational, life care planners, and economists, what the special damages and needs are of those individuals with spinal cord injuries. It is often a deficiency left from reported opinions, to see experts ignore or be unaware of the domino impact a person with SCI has. Additional service items will be considered and recommended when developing economic damages based on a modified set of costs for products and services. Each individual with any level of SCI impairment, needs a comprehensive and detailed family analysis also, not the "client" or "evaluee" alone.

From my professional and personal experience with my oldest son since March 11, 2023, seeing the immediate SCI condition, Medic-Flight from Mexico to three major hospitals for specialty care, I have changed my assessment approach. Of concern is how many forget the "impaired person" is not the only one who needs comprehensive attention to detailed needs. It is a family affair that permeates virtually all members in one way or another. The presentation offers time to address attendees concerns and questions on what they may choose to consider on current or future case work.

By the end of the presentation, participants will be able to:

1. Address the complex domino effect of spinal cord injuries; how a client injury damages claims extend beyond the "patient."
2. Recommendations on how and why to capture additional costs of future care directly and indirectly related to the SCI, *i.e.*, spouse, siblings, legal-wills and trusts, or succession planning.
3. Understand why the #1 cost of SCI is "caregiver" fees cumulative over the patient's lifetime. The continued problem of selection, screening, and finding trained caregiver assistants.