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PROFESSIONAL EXPERIENCE

Milestone - Founder/Member, 2012-Present

- Founder of suite of nationally acclaimed companies responsible for settlement administration, planning, and management
- Administrator or consultant on over 10 major multidistrict litigations and counting
- Involved in landmark cases such as the BP/Deepwater Horizon settlement, the 9/11 Victim Compensation Fund, the 1983 Beirut Marine Barracks Bombing, the U.S. embassy bombing in Tanzania, and notable national aviation disasters

Milestone Foundation – Co-Founder, 2016-Present

- Created first not-for-profit organization in the non-recourse lending industry
- Provides financial relief to individuals and families in litigation and in need of support

CrowFly – Co-Founder, 2017-Present

- Founder of start-up that enables people to sell and buy future structured settlement payments
- Disrupting an established industry that historically takes advantage of people who need to sell their structured settlement for cash

Forge Consulting, LLC – Founder/Owner/CEO, 2003-2012

- Founded national settlement planning and structured settlement firm
- Offered expertise in client solutions that provide lifelong security and valuable tax advantages

Army National Guard – Captain, 142d Aviation Regiment, Rochester, NY, 1999-2003

EPS Settlements Group - Consultant, Northeast Representative, 1999-2002

United States Army – Captain, AH-64 Aviator, Commander, Aviation Officer, Aviation Risk Manager

- South Korea Plans Senior Staff Manager-Government Claims Liaison 1997 – 1999.
- Texas Project Leader 1995 – 1997
- Platoon Leader – Brigade Taskforce 1995 - 1997
- Alabama/Texas AH-64 Attack Helicopter Operations Manager 1992 – 1995.

EDUCATION

B.S., Engineering and Spanish (Double Major), 1992. United States Military Academy (West Point, NY)

AWARDS & DISTINCTIONS

- Licensed in all 50 States
- 2013 Who's Who in Insurance, *Buffalo Business First*
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- 2003 ATLA Award for excellence in advocacy and commitment to the victims of September 11th
- 2003 MATA Humanitarian Award for commitment and dedication to the victims of September 11th
- 2002 Trial Lawyers for Public Justice appreciation for support and work for the TLPJ Foundation
- Rated in the top 1% of all Army Officers during the years 1992-1999

BUSINESS ACUMEN

- Experienced Expert Witness
- Has provided consultation on taxation of periodic payment transactions, Special Needs Trusts, Reversionary Trusts, Living Trusts, and Irrevocable Trusts.
- Experience in pre and post settlement services, including: Rated Ages, Workers' Compensation, SSD/SSI, Medicare/Medicaid, Medical Malpractice, Railroad Litigation, Self-Insured Retention (SIR), Mass Torts & Class Actions, Matrimonial/Division of Assets, Medicare Set-Asides, Structured Sales, Structured Settlements, Special Needs Trusts, Government Benefits Planning, and economic analysis.
- Non-physical Tort experience: Wrongful Termination, Employment Discrimination and Bad faith, Professional Liability.
- Developed Attorney Fee Deferral program for trial lawyers
- Attended 800+ mediations
- Active contributor to LegalExaminer.com for six years, publishing blog content for community of attorneys, safety industry experts, and consumer advocates
- Advocate for bills designed to protect consumers and enable pro bono settlement consulting

PROFESSIONAL AFFILIATIONS

- Board Member, Casey Feldman Foundation and EndDD.org, End Distracted Driving
- Board of Directors, Injury Board
- Member, Trial Lawyers Care Task Force, AAJ
- Member, American Association for Justice Eagle PAC