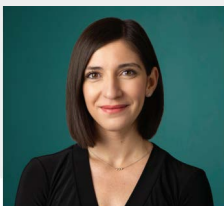


# Bridging the Gaps in Our Civil Justice System

**MTMP Magazine Editor Sara Stephens interviewed the recipient of the 2023 MTMP Legal Services Innovation Award, Amy Fogle, CEO of Milestone. John Bair, Milestone founder, joined the conversation.**

by Sara G. Stephens, Editor in Chief



Amy Fogle, CEO, Milestone, and recipient of the 2023 MTMP Legal Services Innovation Award

Milestone is a settlement solutions firm that has been on a brilliant growth trajectory over the past few years. MTMP sat down with Amy Fogle, CEO, and John Bair, founder, of Milestone to learn a bit more about the settlement administrator and the digital platform that has the mass tort world buzzing.

**MTMP:** Let's jump right into things. Your website describes Milestone as "the next generation in post-settlement solutions." What is Milestone, and what makes you "next generation"?

**Amy Fogle (AF):** Milestone is a high-touch administrator that is pioneering digital payment solutions in the multiparty and mass tort spaces. We are currently the proven platform to collect digital signatures and pay claimants electronically. As a next-generation provider, we're always one step ahead when it comes to innovating the latest technology solutions.

**MTMP:** For many of our readers who have known Milestone for years, what you've just described is a very sophisticated evolution of the Milestone we knew even a few years ago. Can you speak to that?

**John Bair (JB):** Milestone has certainly evolved through the years, which is all any business owner could hope for. We began as a settlement planning firm that worked one-on-one with injured plaintiffs, and we've now grown to serve thousands of plaintiffs simultaneously—all while maintaining our same core values. Whether it shows up as us sponsoring initiatives that promote diversity in the legal space or as a technology platform that empowers plaintiffs and their attorneys—the driving principle is the same. Milestone is a firm that takes action

to bring our society closer to a sound civil justice system.

**AF:** And to build on that, I will say that yes, we have recently shifted our focus to applying technology in the context of mass tort settlement. But we will always maintain that driving principle and purpose, now just on a grander scale. Like John said, the presentation may look different these days, but the Milestone core is steadfast.

**MTMP:** John, from your perspective, where did this guiding tenet originate?

**JB:** I am a graduate of West Point and spent 10 years on active duty. Civil justice advocacy and serving others is built into my nature, and that ethos is woven into the fabric of Milestone. From the time I founded the firm, Milestone has been on mission to bridge the gaps in our civil justice system. We have built upon decades of good work and doing what is right. Our tenet of putting plaintiffs first and being principled in all our dealings has its basis in the real process that litigants deserve.

**MTMP:** It's evident you have a very strong connection to Milestone. In that context, talk to me a bit about the leadership transition from you to Amy.

**JB:** I valued Amy's keen understanding of the broader firm and what it takes to drive it forward from the moment I met her. When it came time to assess the future of Milestone, Amy was the clear champion. She's a sophisticated agent of change and an expert on qualified settlement fund administration. As CEO and co-owner of Milestone, Amy drives the firm's growth with forward-thinking strategy, and she is adept at building a world class team that

the civil justice community deserves.

**AF:** Thinking back to that first time I met John, I remember how striking it was to witness his passion for the industry and helping others. I'm humbled to be building upon that bedrock as I lead Milestone into the future, taking that foundation and simply evolving it. I make sure that even the newest Milestone employees know that purpose and people are two of our primary guiding values as a firm.

**MTMP:** Since the leadership transition, Milestone has unveiled some groundbreaking tech in the mass tort industry. Can you tell me a bit about that?

**AF:** Through our Pathway digital platform, we've streamlined the payment process from beginning to end. As a centralized hub for all settlement data and distribution, Pathway saves law firms time and money. The platform guides plaintiffs from signing their closing statements, to assessing their settlement planning options, through to choosing how they would like to be paid. There's no messy paperwork, no confusing spreadsheets. Everything is organized into one digitized process.

**MTMP:** Have you found that claimants respond well to being given this level of control at settlement?

**AF:** Overwhelmingly, yes. With the largescale mass tort cases we're seeing lately, it's inevitable that some individualization gets lost along the way. Milestone's approach combats that. Many claimants have suffered unique traumas, so we ensure 100% of our staff is trauma informed. Some claimants receive government benefits, so we have resources available to help them navigate their financial situation. Sometimes

claimants get snagged at one point or another in the settlement process, so we have a solutions team on deck to meet them where they're at and help them through. Each claimant's situation is nuanced and unique, so they value a settlement process that reflects that.

**MTMP:** What do attorneys stand to gain from using Pathway to manage their mass tort settlements?

**AF:** Aside from the obvious increased client satisfaction, Pathway sets attorneys up for success in a holistic way. We act as a proactive partner, handling everything from setting the groundwork for fee deferral to ensuring that onboarding and project charter tasks are ready to launch at settlement. We work in lockstep with law firm operations, and attorneys always have access to transparent reporting and visualizations through our attorney portal dashboards. When attorneys trust us to integrate Pathway into their law firm, it's

that engrained integration that allows us to best keep a pulse on industry needs and continuously innovate.

**MTMP:** What is something about qualified settlement fund administration that you wish more mass tort attorneys understood?

**AF:** A trend I've been seeing in the space is mass tort firms establishing a system of record (SOR), meaning they find an administration partner whose service can act as a central hub for their data collection and management. Firms are realizing they don't have to use the administrator appointed by leadership, which leaves them open to selecting a partner that meets their unique needs. We advise firms to choose a partner who is transparent with the data, able to integrate across all systems, and open to becoming the linchpin of a firm's backoffice. Centralized data is the key to efficient QSF administration, because it's that line of sight

that's needed to get the settlement money out the door.

**MTMP:** What's next for both of you and for Milestone?

**JB:** Personally, I feel a sense of pride in building Milestone from the ground up. As founder, it was my duty to set the foundation and direction for Milestone, and I look forward to seeing our firm reach new heights and consistently achieve sustained growth while maintaining our reputation. We currently have an incredible, growing team, and they are the true innovators and backbone of all that is happening at Milestone.

**AF:** I'm energized to lead Milestone into the future. Our team is the most industrious, dynamic group I've ever had the privilege of knowing, and we have countless innovations in the pipeline to help so many more people in the years to come.



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