

## Professional Biography of Fred Whittlesey Compensation Venture Group, SPC

### Litigation Experience

Mr. Whittlesey has served as an expert witness and consultant in numerous legal cases involving reasonableness, and interpretations and/or calculations relating to executive and equity compensation plans. He has been retained as an expert in the following cases (current active cases in **bold**):

**Confidential Individual Plaintiff v. Confidential Corporate Defendant (2020)**  
**Private JAMS Arbitration (Seattle, WA)**  
**Retained by Smyth & Mason PLLC for Defendant**  
**(in progress)**

Confidential Individual Plaintiff v. Confidential Corporate Defendant (2020)  
Private JDR Arbitration (Seattle, WA)  
Retained by Smyth & Mason PLLC for **Plaintiff**  
Case work discontinued

**Kiarie v. Dumbstruck, et al (2020)**  
**United States District Court – Southern District of New York**  
**Retained by Foster Garvey LP for Plaintiff**  
**Opinion Letter issued, Deposition pending**  
**(in progress)**

Taylor v. Access All Directory Placement Service, Inc. (2020)  
Superior Court of California – County of Orange  
Retained by The Guerin Law Firm for **Defendants**  
Case settled

**Confidential Individual Claimant v. Confidential Corporate Defendant (2019)**  
**FINRA Arbitration (New York)**  
**Retained by Lax & Neville LLP for Claimant**  
**(in progress – delayed due to COVID-19)**

Confidential Corporate Taxpayer v. Internal Revenue Service (2019)  
Response to Audit  
Retained by LeSourd & Patten, P.S. for **Taxpayer**  
Opinion Letter issued

**Confidential Individual Plaintiff v. Confidential Corporate Defendant (2019)**  
**Private JAMS Arbitration (San Francisco, CA)**  
**Retained by Kaedian LLP for Respondent**  
**Opinion Letter Issued**  
**(in progress)**

**O'Neil Digital Solutions, LLC v. James Lucanish (2019)**  
**Superior Court of the State of California for the County of Los Angeles – Central District**  
**Retained by Affeld Griyakes LLP for Defendant and Cross-Complainant**  
**(in progress – delayed due to COVID-19)**

Confidential Claimant vs. Confidential Respondents (2019)  
American Arbitration Association  
Retained by Gast Johnson & Muffly for **Respondents**  
Opinion Letter and Rebuttal issued, case settled

**Confidential Plaintiffs v. Confidential Corporate Defendant (2018)**  
**Superior Court of the State of California, County of San Mateo**  
**Retained by Sanford Heisler Sharp, LLP for Plaintiffs as Consulting Expert**  
**(in progress)**

Maggard/Schricker Engineering Group, Inc. v. Johnson and Leos (2018)  
Superior Court of the State of California, County of Santa Clara  
Retained by Rossi, Hamerslough, Reischl & Chuck for **Plaintiff and Cross-Complainant**  
Opinion letter issued, Deposition given

Toedtman v. TurnPoint Medical Devices (2018)  
Superior Court of the State of Delaware  
Retained by Halloran Farkas + Kittila LLP for **Plaintiff**  
Opinion letter issued

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### Litigation Experience (continued)

Sobolik v. Northern Thunderbird Inc. (2017)  
Supreme Court of British Columbia  
Retained by Camp Fiorante Matthews Mogerman for **Plaintiff**  
Opinion Letter Issued, case settled

Confidential Individual Plaintiff v. Confidential Corporate Defendant (2017)  
Private Arbitration (Orange County, California)  
Retained by Michelman & Robinson, LLP for **Defendant**  
**Testified** in arbitration hearing

Confidential Corporate Taxpayer v. Internal Revenue Service (2017)  
Response to Audit  
Retained by Snow Christensen & Martineau for **Taxpayer**  
Opinion Letter issued

Confidential Individual Plaintiff v. US Citizenship and Immigration Services (2017)  
USCIS  
Retained by Law Offices of Shawn Sedaghat for **Plaintiff**  
Opinion Letter issued re: L1-A Visa status

Confidential Individual Plaintiff v. US Citizenship and Immigration Services (2017)  
USCIS  
Retained by Law Offices of Shawn Sedaghat for **Plaintiff**  
Opinion Letter issued re: L1-A Visa status

Wall, etc. v. Hewlett-Packard Company et al (2017)  
Superior Court of the State of California for the County of Orange  
Retained by Franklin D. Azar & Associates, P.C. for **Plaintiffs** (class action suit)  
**Deposition** given

Chen and Manindra v. Fleetcor Technologies, Inc. (2016)  
United States District Court, Northern District of California  
Retained by Sebastian Miller Law, P.C. for **Plaintiff**  
Opinion Letter issued

Confidential Individual Plaintiff v. Confidential Corporate Defendant (2016)  
Private Arbitration (Connecticut)  
Retained by Lax & Neville LLP for **Plaintiff**  
Case settled, no report issued

Confidential Individual Plaintiff v. Confidential Corporate Defendant (2016)  
Private Mediation (North Carolina)  
Retained by Marcellino & Tyson PLLC for **Plaintiff**  
Report issued, **testified** in mediation

Confidential Plaintiff v. United States (2016)  
United States District Court, District of Idaho  
Retained by U.S. Department of Justice Tax Division as **Defendant**  
Case settled, no report issued

Price v. Price (2016)  
Superior Court of Washington for King County  
Retained by McNaul Ebel Nawrot & Helgren PLLC for **Plaintiff**  
Report issued, **deposition** given, **testimony** given

Confidential Plaintiff v. Confidential Defendant (2014)  
Alternative Dispute Resolution, Seattle, WA  
Retained by McNaul Ebel Nawrot & Helgren PLLC for **Plaintiff**  
Report issued, **deposition** given, **testimony** given

Kern v. Income Research & Management, et al (2014)  
Suffolk Superior Court, Commonwealth of Massachusetts  
Retained by Sheppard Mullin Richter & Hampton LLP for **Defendants**  
Courtroom testimony given (jury trial)

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### Litigation Experience (continued)

Confidential Plaintiff v. Confidential Defendant (2013)  
JAMS Arbitration, Santa Monica, CA  
Retained by Liner Grode Stein Yankelevitz et al. for **Plaintiff**  
Case settled, no report issued

North v. Fluke (2013)  
King County Superior Court, State of Washington  
Retained by Davis Wright Tremaine LLP for **Countersuit Plaintiff**  
Report issued, case settled

Pomilia, et al v. Chapman, et al (2012)  
Superior Court of California, County of San Mateo  
Retained by Barg Coffin Lewis & Trapp for **Defendants**  
Designated, case settled, no report issued

Maese v. Paulk, et al (2012)  
Eighth Judicial District Court, Clark County, Nevada  
Retained by Jolley Urga Wirth Woodbury & Standish for **Plaintiff**  
Report issued, Rebuttal issued, courtroom **testimony** given

McGraw v. McGraw, et al (2011)  
Superior Court of California, County of San Mateo  
Retained by Morrison & Foerster for **Defendant**  
Designated, case settled, no report issued

Marriage of Piccinini (2011)  
Superior Court of California, County of Monterey  
Retained by Goss & Goss for **Respondent**  
Report issued, courtroom **testimony** given

Broadcom Corporation Derivative Litigation (2010)  
United States District Court, Central District of California  
Fact witness  
Video **testimony** given

Johnson, et al v. Couturier, Jr., et al (2009)  
Stanton v. Couturier, Jr.  
United States District Court – Eastern District of California  
Retained by Morgan, Lewis & Bockius for **Defendant**  
No report issued

Gonzalez v. Mayhall, Custom Control Concepts (2009)  
Superior Court for the State of Washington in and for the County of King  
Retained by Dorsey & Whitney for **Defendant**  
Expert report submitted, no deposition or testimony

Westmoreland Coal Company v. Christopher K. Seglem (2008)  
District Court, El Paso County, State of Colorado  
Retained by Davis Graham & Stubbs LLP for **Plaintiff**  
Expert report and rebuttals submitted, no deposition or testimony

Wallace R. Barr v. Harrah's Entertainment, Inc. (2007)  
United States District Court - District of New Jersey  
Retained by Blank Rome LLP for **Plaintiff (class action suit)**  
Expert report submitted, no deposition or testimony

PJC Technologies, Inc. v. Peter J. Casson (2006)  
United States District Court – Central District of California  
Retained by Waldron & Olson for **Defendant**  
No report issued

Miguel Jara Sr. v. Suprema Meats, Inc., et al (2006)  
Superior Court of the State of California, County of Alameda  
Retained by Law Offices of Steven J. Hassing for **Defendant**  
Expert report submitted, no deposition or testimony

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Compensation Venture Group, SPC**

**Litigation Experience (continued)**

Robert Cockrell v. Ambry Genetics, Inc. (2005)  
Orange County Superior Court  
Retained by Waldron & Olson for **Defendant**  
**Deposition** given

Hyland v. Hughes Aircraft Company/General Motors (2000-2002)  
Retained by Kirkland & Ellis for **Defendant**  
Exhibits prepared, called for testimony, case settled  
Consultant to legal team

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NOT RETAINED FOR THIS CASE