



2024 Advanced eDiscovery Institute Agenda

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2024 Advanced eDiscovery Institute

THURSDAY, NOVEMBER 14, 2024

Breakfast & Registration

7:30 a.m. – 8:15 a.m., Capitol Foyer

Co-Chair Welcome Remarks

8:15 a.m. – 8:30 a.m., Plenary Room

Alison Grounds, Troutman Pepper

Scott Milner, Morgan, Lewis & Bockius LLP

CEO Insights: The Evolution and Future of eDiscovery

8:30 a.m. – 9:30 a.m., Plenary Room

Not eligible for CLE or CPE credit

Alison Grounds, Troutman Pepper

Wendell Jisa, Reveal

Andy Macdonald, Consilio

Phil Saunders, Relativity

2024 Case Law Update

9:30 a.m. – 11:00 a.m., Plenary Room

Hon. Jared Bennett, District of Utah Federal Court

Hon. Sarah Cave, Southern District of New York Federal Court

Hon. Willie Epps, Western District of Missouri Federal Court

Hon. Karen Wells Roby, Eastern District of Louisiana Federal Court

Hon. Scott U. Schlegel, Louisiana Fifth Circuit of Appeal

Lauren Schwartzreich, Littler Mendelson P.C.



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Networking Break

11:00 a.m. – 11:15 a.m., Capitol Foyer

Thank you to our networking sponsor, Consilio!

Beyond the Hype: A Deep Dive into the Reality Generative AI for eDiscovery

11:15 a.m. – 12:15 p.m., Plenary Room

Jessica Escalera, HSBC

Ava Guo, AT&T

Chris Haley, Relativity

Robert Keeling, Redgrave LLP

Kate Orr, Orrick, Herrington & Sutcliffe LLP

Lunch on Your Own & Networking Break

12:15 p.m. – 1:30 p.m.

CONCURRENT SESSIONS

Choice Overload: How to Select and Manage the Tools in Your Toolchest

1:30 p.m. – 2:30 p.m., Plenary Room

Rishi Chhatwal, Alvarez & Marsal Holdings, LLC

Stephanie Clerkin, Korein Tillery LLC

Erika Morgan, ProSearch

Matt Poplawski, Hilgers Graben PLLC

Jessica Tseng Hasen, Perkins Coie LLP

SUN and ROT, Chats and Channels, AI and PHI: The Impact of Evolving Technology on Information Governance

1:30 p.m. – 2:30 p.m., Bulldog Room

Lucile Cohen, Nelson Mullins Riley & Scarborough LLP



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Natausha Cruz Wilson, NCW Consulting

RJ McFadden, DaVita

Jennifer Mott Williams, Morgan, Lewis & Bockius LLP

Adam Rouse, Walgreens

Data Driven Advocacy: Data Insights Can Drive Your Case

1:30 p.m. – 2:30 p.m., Clocktower Room

Julian Ackert, iDiscovery Solutions

Courtney Fletcher, Guidepost Solutions

Deb Foster, Edgeworth Economics

Lenora Gray, Redgrave Data

Networking Break

2:30 p.m. – 2:45 p.m., Capitol Foyer

CONCURRENT SESSIONS

Unraveling the Digital Knot: eDiscovery Strategies in M&A and Divestitures

2:45 p.m. – 3:45 p.m., Plenary Room

Kevin Brady, 3M

Rose Jones, King & Spalding LLP

Sara Meyers, Takeda Pharmaceuticals

Kiriaki Tourikis, Reed Smith LLP

Justin Van Alstyne, T-Mobile

Wrangling AI and Future Disruptors with Proven Preservation and Discovery Fundamentals

2:45 p.m. – 3:45 p.m., Bulldog Room

Jennifer Hope Bernstein, JPMorgan Chase & Co

Jacob Canter, Crowell & Moring LLP



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Danielle Davidson, Ropes & Gray LLP

Laura Hunt, Meta

Will No One Rid Me of this Meddlesome Priv Review?

2:45 p.m. – 3:45 p.m., Clocktower Room

Hon. Allison Goddard, Southern District of California Federal Court

Rebekah Bailey, Nicolas Kaster PLLP

Jason Moore, Winston & Strawn LLP

Megan Podolny, Hunton Andrews Kurth, LLP

Graham Rollins, Capital One

Brian Stempel, Lineal

Networking Break

3:45 p.m. – 4:15 p.m., Capitol Foyer

A Practical Discussion of Unexpected Ethical Missteps: Beyond Competence and Confidentiality

4:15 p.m. – 5:15 p.m., Plenary Room

Hon. Kimberly Priest Johnson, Eastern District of Texas Federal Court

Natalie Carter, Duke Energy

David Kessler, Norton Rose Fulbright

Shari Klevens, Dentons

Elizabeth Simon, Akin Gump Strauss Hauer & Feld LLP

eDiscovery Leaders Quick Takes: Insights and Guidance

5:15 p.m. – 5:45 p.m., Plenary Room

Not eligible for CLE or CPE credit

Maura Grossman, University of Waterloo



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Scott Milner, Morgan, Lewis & Bockius LLP

Jonathan Redgrave, Redgrave

Ariana Tadler, Tadler Law LLP

Paul Weiner, Littler Mendelson P.C.

Cocktail Reception

5:45 p.m. – 7:30 p.m., Grand Ballroom Salon I



2024 Advanced eDiscovery Institute

FRIDAY, NOVEMBER 15, 2024

Breakfast & Registration

7:30 a.m. – 8:15 a.m., Capitol Foyer

Co-Chair Welcome Remarks

8:15 a.m. – 8:30 a.m., Plenary Room

Jeane A. Thomas, Crowell & Moring LLP

Paul D. Weiner, Littler Mendelson P.C.

Fireside Chat with Harvey's CEO, Winston Weinberg

8:30 a.m. – 9:30 a.m., Plenary Room

Not eligible for CLE or CPE credit

John Rosenthal, Winston & Strawn LLP

Winston Weinberg, Harvey

Networking Break

9:30 a.m. – 10:00 a.m., Capitol Foyer

Thank you to our networking sponsor, Everlaw!

CONCURRENT SESSIONS

Don't Wait to Collaborate: Advanced Technical Aspects of Collaboration Platforms

10:00 a.m. – 11:00 a.m., Plenary Room

Michelle Briggs, Goodwin Proctor LLP

Jamie Brown, Lighthouse

Seth Eichenholtz, Mastercard

Nate Latessa, HaystackID

Nkosi Sharpe, Coinbase



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Responding to Government Investigations in the Era of Data Sprawl

10:00 a.m. – 11:00 a.m., Bulldog Room

Allison DeLaurentis, Bristol-Myers Squibb
Carrie Holt, U.S. Securities and Exchange Commission
Ted Jacobs, Baker & Hostetler LLP
Daniel Lim, U.S. Department of Justice
CJ Mahoney, Cleary Gottlieb Steen & Hamilton LLP

Collective Wisdom: Modernized Data Identification and Collection Strategies

10:00 a.m. – 11:00 a.m., Clocktower Room

Hon. William Matthewman, Southern District of Florida Federal Court
Ashley Picker Dubin, Day Pitney LLP
Tessa Jacob, Husch Blackwell
Kelly McNabb, Lieff Cabraser Heimann & Bernstein, LLP
Nirav Shah, The Home Depot
Scott Wandstrat, Gentiva

Networking Break

11:00 a.m. – 11:15 a.m., Capitol Foyer

CONCURRENT SESSIONS

The Modern Protective Order: Balancing Privacy, Security, and Practicality

11:15 a.m. – 12:15 p.m., Plenary Room

Hon. Sarah Cave, Southern District of New York Federal Court
Nima Adabi, Kirkland & Ellis LLP
Ross Gotler, Paul, Weiss, Rifkind, Wharton & Garrison LLP



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Chad Roberts, eDiscovery CoCounsel

Jennifer Scullion, Seeger Weiss LLP

Crossing Borders without Crossing Wires

11:15 a.m. – 12:15 p.m., Bulldog Room

Hon. Xavier Rodriguez, Western District of Texas Federal Court

Franziska Fuchs, Bosch

Leeanne Mancari, Covington & Burling LLP

Dino Wilkinson, Baker & McKenzie LLP

Lunch & Networking Break

12:15 p.m. – 12:45 p.m., Capitol Foyer

Links, Attachments, Pointers — Oh My!

12:45 p.m. – 1:45 p.m., Plenary Room

Hon. Rukhsanah Singh, District of New Jersey Federal Court

Phil Favro, Innovative Driven

Paul McVoy, Repario

Michelle Six, Gunster

Jeremy Wikler, Shook, Hardy & Bacon LLP

Networking Break

1:45 p.m. – 2:00 p.m., Capitol Foyer

Town Hall Meeting with Our Judges

2:00 p.m. – 3:30 p.m., Plenary Room

Not eligible for CLE credit

Hon. Allison Goddard, Southern District of California Federal Court



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Hon. William Matthewman, Southern District of Florida Federal Court

Hon. Heather McShain, Northern District of Illinois Federal Court

Hon. Xavier Rodriguez, Western District of Texas Federal Court

Hon. Brendan Sheehan, Ohio Cuyahoga County Common Pleas Court

Hon. Rukhsanah Singh, District of New Jersey Federal Court

Allison Stanton, Meta

Conclusion

3:30 p.m.