LexVid Services, Inc., Presents:

Navigating the Ethics of Litigation Finance

Total: **54 Minutes**

Speakers:
James Batson, Esq.

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The use of litigation financing continues to engender spirited debate within the legal community. Attorney ethics requirements are a central focus of this debate – both for in-house counsel and private practitioners. Some of the major issues include an attorney's duty to use independent professional judgment, avoid conflicts of interest, and protect the attorney-client and work product privileges.

In this engaging and informative program, taught by Jim Batson, Senior Investment Manager and Legal Counsel for litigation finance company Omni Bridgeway, participants will learn how to ethically use non-recourse litigation funding to, among other things, finance their cases, obtain working capital and create case portfolios. The program will address how the applicable Rules of Professional Responsibility intersect with litigation funding, as well as the notable legal decisions that have impacted the litigation funding industry in 2020, including a discussion of disclosure rules. A detailed appendix will be provided containing the ethics opinions and additional contents discussed during the program.

Topics (All topics below are ethics):

1. Introduction and overview: ethics of litigation finance (7 min.)
2. Consider all the ways that litigation finance and attorney ethics intersect (20 min.)
3. Recent legal case decisions on the examining ethics (15 min.)
4. How to ethically integrate litigation financing into every step of litigation strategy (including on appeal) (12 min.)

Total: 54 minutes

Presenter: Jim Batson is a Senior Investment Manager and Director of Business Development and Structuring-US and head of Omni Bridgeway's New York office. Jim also assists his fellow Omni Investment Managers and Legal Counsel with formulating deal terms and structures. He monitors a multi-million-dollar investment portfolio and leads the company's corporate outreach initiative working with decision-makers and influencers involved in legal, risk and capital management seeking non-resource financing for commercial lawsuits. Before joining Omni Bridgeway in 2014, Jim held roles as Chief Operating Officer and Consultant for two commercial litigation finance companies.

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Jim serves as a strategic partner, providing consultation on cases from initial review through final resolution. His guidance is drawn from 20 years of experience as a trial lawyer and senior partner with a prestigious plaintiff's law firm that brought many of its cases on a contingent-fee basis. An accomplished litigator, Jim represented the plaintiff in Zubulake v. UBS Warburg, a case widely regarded as redefining parties' e-discovery obligations in litigation. Jim proves to be a valuable resource for lawyers appearing in various jurisdictions. He has tried cases in federal and state court and before the American Arbitration Association, JAMS, FINRA and the Chicago Board of Trade. He also handled regulatory proceedings before the SEC, the NYSE and FINRA.

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