



**Expert Witness  
Workshop & Mock Trial  
HoustonAppraisers.org**

**November 5, 2021  
8:30 am - 6:00 pm**

**4900 Fournace Place  
Houston, Texas**



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# **Welcome to the Annual International**



**Expert Witness  
Workshop & Mock Trial  
[HoustonAppraisers.org](http://HoustonAppraisers.org)**

**November 5, 2021  
8:30 am - 6:00 pm**

**Hosted by the  
Houston Chapter of the  
American Society of Appraisers**



*Howdy from Houston and Welcome!*

to the second International Expert Witness Workshop & Mock Trial!

The Houston chapter of the American Society of Appraisers is pleased to host this workshop and welcomes attendees from near and far. An online attendance opportunity has provided an international audience of professionals attending across the U.S., and as far reaching as Canada, Israel, Singapore, and Mexico. Expert witnesses are joining us to explore, learn, connect, and network.

Attendees comprise an audience of experts in appraisal fields of business valuation, personal property, machinery and technical specialties, jewelry, and real property, in professions that include the energy sector, architects, engineers, clinical psychology, museum curators, CPAs and more. This event hosts a vast array of professional specialists who offer litigation services or are considering offering them.

Workshop committee members are very much appreciated for assistance in planning, organizing, and marketing this event. Sincere thanks and gratitude are given to fellow Houston ASA colleagues serving on the 2021 Workshop Committee.... Melanie Modica has designed the program, organized the mechanics of the day, made sure everyone eats very well, and so for her efforts I give many thanks of gratitude. Corey DeWitt and Cameron Tipton have provided endless hours of technical support and equipment management for our online audience, while Barbara Blades-Lines and Amy Lawch have marketed the Workshop to other organizations and professionals. Additional thanks go to Scott Miller, the ASA Region 3 Governor, for marketing to appraisers worldwide. All committee members are appreciated for contributions in creating this incredible expert-focused educational opportunity. Many thanks!

This workshop is also indebted to our amazing presenters and mock trial participants who have given their time and efforts to provide insight, guidance, experiences and more. The Committee has great gratitude for Honorable Michael Landrum, and counselors Joshua Wood, Stephanie Harp, Denise Peterson, James Smith, and Denise Adkison-Brown—Many thanks for making this day happen! And finally, our expert witnesses Jeffrey Hays, Barbara Blades-Lines, James Herr, Al Stern and Ola Fazoranti who have graciously volunteered to occupy the hot seats!

Let's learn—connect—network—and share.....

*the day is now in session!*

Pamela Bensoussan, ASA, ARM, CFLC  
Expert Witness Workshop & Mock Trial Chair 2021

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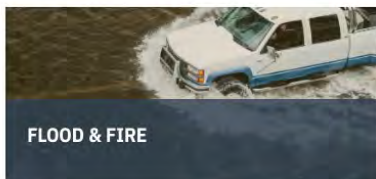
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# 2021 Expert Witness Workshop & Mock Trial TIMELINE

9:00 – 9:05

Welcome Address and Introduction of Speaker  
Pamela Bensoussan, Workshop Chair

9:05 – 9:45

Keynote Address and Trial Testimony Information  
Hon. Michael Landrum

## **9:45 – 12:00 Session 1: Mock Trial**

9:45 – 10:30

Introduction of Mock Trial Experts, Attorneys,  
Storyline – Melanie Modica

**Judge: Michael Landrum**

**Counselors: Josh Wood/DIRECT, Stephanie Harp/CROSS**

**Expert: Jeff Hays**, River Oaks Residence Value  
REDIRECT as time permits...learning + Q&A

10:30 – 10:40 REFRESHMENT BREAK

10:40 – 11:25

**Judge: Michael Landrum**

**Counselors: Josh Wood/DIRECT, Stephanie Harp/CROSS**

**Expert: Barbara Blades-Lines**, Appraisal Review of Residential  
Personal Property Values  
REDIRECT as time permits...learning + Q&A

11:25 – 12:00

**Judge: Michael Landrum**

**Counselors: Josh Wood/DIRECT, Stephanie Harp/CROSS**

**Expert: James Herr**, Boutique Compounding Pharmacy Business  
Value  
REDIRECT as time permits....learning + Q&A

12:00 – 12:45 LUNCH

## **12:45 – 2:35 Session 2: Depositions**

12:45 – 12:50

Introduction of Deposition Experts, Attorneys, Storyline  
Pamela Bensoussan

12:50 – 1:15

Deposition Information Presentation

**Counselor Jim Smith**

1:15 – 1:40

Deposition Segment 1

**Counselor: Jim Smith**

**Expert: Al Stern**, Coin Collection Values Learning+Q&A as time permits

1:40 – 2:05

Deposition Segment 2

**Counselor: Denise Adkison-Brown**

**Expert: Ola Fazoranti**, Restaurant Value Learning + Q&A as time permits

2:05 – 2:35

Deposition Segment 3

**Counselor: Jim Smith**

**Expert: Barbara Blades-Lines**, Restaurant Artwork Values Learning + Q&A as time permits

2:35-2:45 REFRESHMENT BREAK

## **2:45 – 3:15 Session 3: Arbitrations**

2:45 – 2:50

Introduction of Attorneys, Experts, Storyline – Melanie Modica

2:50 – 3:15

Arbitration Information Presentation

**Denise Peterson**

3:15 – 4:00

Arbitration Segment 1

**Counselors: Denise Peterson, Denise Adkison-Brown**

**Experts: Jeff Hays, James Herr**

Vacation Home Value Learning + Q&A as time permits

4:00 – 4:45

Arbitration Segment 2

**Counselors: Denise Peterson, Denise Adkison-Brown**

**Experts: Al Stern, Ola Fazoranti**

Coin Collection Value, Restaurant Value Learning+Q&A as time permits

4:45 – 5:15

**General Q&A -- Panel of Counselors and Expert Witnesses**

Closing Remarks: Pamela Bensoussan, Workshop Chair

5:15 – 6:00

Reception & Networking

# **Hon. Michael Landrum**

## **Keynote Address and Trial Testimony Information 9:05 - 9:45am**



Michael Landrum is a native Houstonian. He grew up in the Spring Branch area and attended Memorial High School. He received his B.A. from The University of St. Thomas and his law degree from the University of Texas. For 45 years, Michael Landrum has been a licensed attorney, and holds specialist certifications in the fields

of Civil Trial Law and Civil Appellate Law from the Texas Board of Legal Specialization. In his practice he represented businesses and business people in matters involving a wide variety of transactional, litigation and appellate matters.

For six years, he presided as State District Court Judge in civil trial matters of all types. He has served as an arbitrator in hundreds of cases administered by the American Arbitration Association and FINRA. Landrum has been a mentor to dozens of law students and young lawyers, taught about American courts at Houston Baptist University, served as judicial liaison to the Houston Young Lawyers Association, lectured in continuing legal education programs, judged student mock trial and moot court competitions, and is active in Houston Bar Association activities.

**Notes** \_\_\_\_\_

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## **Expert Witness Workshop & Mock Trial 2021**

### **MOCK STORYLINE**

Workshop Mock Sessions revolve around a marital dissolution.

This case involves two wealthy professionals who are divorcing, Mr. John Johnson and Mrs. Joan Johnson.

Please note these are fictional characters and fictional properties.

The couple has been married for 20 years. Together, they own a multi-million dollar primary residence in River Oaks in Houston, and a high-end vacation home in Walden, on Lake Conroe. They also own a four-star seafood restaurant in The Galleria in Houston, which features a celebrity chef. This restaurant showcases a collection of Andy Warhol prints owned by the couple. Mr. and Mrs. Johnson also own a 50% share of a boutique compounding pharmacy. Additionally, they also own a coin collection that includes some rare items.

Disputes arise regarding values, just as in most divorces...no one is happy!



# DB LAW

Denise Adkison-Brown  
Law Offices of Denise Adkison-Brown, PLLC  
1300 McGowen, Suite 250  
Houston, TX 77004  
713-714-6206



# Session 1: Mock Trial

Segment One 9:45 — 10:30

Judge: Michael Landrum

Counselors: Josh Wood/ DIRECT, Stephanie Harp/CROSS

Expert: Jeff Hays

River Oaks High-End Residence Value

**Notes** \_\_\_\_\_

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# Session 1: Mock Trial

Segment Two 10:40 — 11:25

Judge: Michael Landrum

Counselors: Josh Wood/ DIRECT, Stephanie Harp/CROSS

Expert: Barbara Blades-Lines

Appraisal Review of Personal Property Values

**Notes** \_\_\_\_\_

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# Session 1: Mock Trial

Segment Three 11:25 — 12:00

Judge: Michael Landrum

Counselors: Josh Wood/ DIRECT, Stephanie Harp/CROSS

Expert: James Herr

Boutique Compounding Pharmacy Business Value

**Notes** \_\_\_\_\_

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# **James E. Smith**

## **Deposition Information Presentation**

### **12:50 — 1:15pm**



Jim Smith specializes in environmental, intellectual property and related litigation. He has tried cases and argued appeals in both civil and criminal matters. In addition to trials and arbitrations, Jim has appeared before the U.S. Environmental Protection Agency, the Texas Commission on Environmental Quality, the Railroad

Commission of Texas, and other administrative agencies and has been the lead oral advocate before the U.S. Court of Appeals for the 5th Circuit, the Supreme Court of Texas, and several Texas Courts of Appeals. Jim has been listed in Chambers USA in Environmental Litigation since 2005.

He has been selected for inclusion in Texas Super Lawyers since 2003 and Best Lawyers in America in Environmental Law since 1995. His degree in chemical engineering combined with his legal experience enable him to bring a unique perspective as he represents refining, petrochemical and other resource related industry clients.

**Notes** \_\_\_\_\_

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# Session 2: Deposition

Segment One 1:15 — 1:40

Counselor: James Smith

Expert: Al Stern

Coin Collection Values

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# Session 2: Deposition

Segment Two 1:40 — 2:05

Counselor: Denise Adkison-Brown

Expert: Ola Fasoranti

Restaurant Value

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# Session 2: Deposition

Segment Three 2:05 — 2:35

Counselor: Jim Smith

Expert: Barbara Blades-Lines

Restaurant Artwork Values

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# Denise Peterson, JD, FCIArb

## Arbitration Information Presentation

### 2:50 — 3:15



Denise Peterson is a full-time professional neutral, focusing her practice exclusively on alternative dispute resolution services. She mediates civil cases and is a panel member for the American Arbitration Association and serves as both a panel member and chair for FINRA. In addition to being a licensed attorney in Texas and New York, she is a solicitor to the Senior Courts of England and Wales and a fellow of the Chartered Institute of Arbitrators. She is also a member of the Association of

Attorney-Mediators and a Houston Bar Foundation Fellow as well as being a member of diverse specialized bar organizations including the Mexican-American Bar Association of Houston, the Muslim-American Bar Association of Houston and is a sustaining member with the Houston Young Lawyers Association. Her memberships also include the Houston International Arbitrator's Club and the Houston Maritime Arbitrator's Association. Ms. Peterson is a sought-after speaker for continuing legal education classes on mediation tactics and strategies, mediation ethics, implicit bias, LGBT issues in mediation, and avoiding grievances.

Ms. Peterson is a member of the Texas Bar Honors College. Committed to access to justice, Ms. Peterson is the founder of Texas Volunteer Mediator Association, an access to justice non-profit providing low bono mediation services into traditionally excluded areas ([txmva.org](http://txmva.org)). Graduating from University of Houston Magna Cum Laude in History in 2007, Ms. Peterson then went on to obtain her juris doctorate from South Texas College of Law in 2010. She is currently pursuing her master's in legal history from Texas Southern University

Ms. Peterson is the recipient of the 2021 Texas Super Lawyer award and was a 2020 Rising Star Super Lawyer and a four-time recipient of Houstonia's Best of Houston Attorneys, from 2018 to 2021. She is often found out on mountain bike trails either riding them or building them with her family or at home reading and providing butler services to her three purrilegals: Hugin, Snicker, and Mayor.





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James Herr, CFA, ASA  
Senior Director

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# Session 3: Arbitration

Segment One 3:15 — 4:00

Counselors: Denise Peterson, Denise Adkison-Brown

Experts: Jeff Hays, James Herr

Vacation Home Values

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# Session 3: Arbitration

Segment Two 4:00 — 4:45

Counselors: Denise Peterson, Denise Adkison-Brown

Experts: Al Stern, Ola Fasoranti

Coin Collection Values, Restaurant Value

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# Mock Trial Expert Witnesses



James Herr ASA, CFA, CPA/ABV, CEIV

James Herr is a Senior Director with Alvarez & Marsal Valuation Services in Houston. Mr. Herr has provided valuation and financial modeling consulting services for more than 20 years. During that time he has performed hundreds of valuation engagements, ranging from business and asset valuations (tangible and intangible); financial instrument valuations; tax valuations; valuations for transaction and strategic planning support; valuation and economic damage analyses in litigation; and fairness and solvency opinions.

He has over twelve years of specialty focus in the Energy and Mining Sectors. In the Energy Sector he has performed valuations for companies in the exploration & production, midstream (including MLPs), oilfield service, downstream (oil refineries and petrochemical plants), and petroleum product distribution sub-sectors. In the Mining Sector he has worked on valuations and financial models related to commodities such as: gold, coal (thermal and coking), lithium, platinum, nickel, aluminum/bauxite, trona, copper, iron ore, steel, titanium, potash, uranium, rare earth minerals, and zinc. James has also performed numerous valuations in the technology, telecommunications, and healthcare industries.

James has considerable experience in financial modeling, as a former leader of an international Big 4 model practice, building and reviewing client-based Excel models for a variety of purposes. He has also led basic and advanced financial modeling courses out of London and Moscow. James earned his Bachelor of Arts degree (Magna Cum Laude) in both Economics and Russian from Brigham Young University, his Master of Arts in Economics degree from the University of California at Berkeley, and a Master of Business Administration degree from California State University at East Bay. He is a Chartered Financial Analyst charterholder, an Accredited Senior Appraiser with the American Society of Appraisers, a Certified Public Accountant in the state of Texas, and holds both the Accredited in Business Valuation and Certified in Entity and Intangible Valuations credentials.

# Mock Trial Expert Witnesses



Ola Fasoranti, CFE

Ola Fasoranti has over eight years of experience overseeing and executing a variety of engagements related to complex contract disputes, economic damages, valuation disputes and investigations. During his career, Mr. Fasoranti has assisted companies, partnerships, legal counsels and other entities with their economic, financial and dispute-related issues.

Mr. Fasoranti has evaluated, analyzed and quantified economic damages in a variety of complex business disputes which have involved claims for lost profits, disgorgement of profits, unjust enrichment, lost earnings, punitive damages, and intellectual property disputes. Additionally, Mr. Fasoranti has worked on corporate, and SEC directed investigations related to fraud, revenue recognition issues, misappropriation of assets, FCPA violations and anti-money laundering investigations related to FDIC and OCC consent orders.

Mr. Fasoranti has worked on engagements of varying sizes with damage claims ranging from millions to billions of dollars, both domestically and internationally, and his clients have ranged from publicly traded entities to private entities in a broad range of industries, including financial services, life sciences, manufacturing, real estate, technology and healthcare.

Prior to joining BVA, Mr. Fasoranti was a Manager in the Forensic & Integrity Services group at Ernst and Young, LLP where he focused on dispute advisory and investigations.

Mr. Fasoranti received a Master's in Finance from Claremont McKenna College. In addition, he received a Bachelor of Science in Mathematics and Bachelor of Arts in Economics from Washington and Lee University.

He is a Certified Fraud Examiner and is a member of the Association of Certified Fraud Examiners.

# Mock Trial Expert Witnesses



Alvin Stern, AM

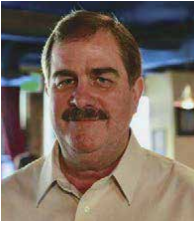
A numismatist since 1966, Al Stern has been affiliated with the American Society of Appraisers for more than 35 years. He has a long history conducting research and producing educational programs and videos. A member of the American Numismatic Association (ANA) he has five video presentations in their education library. Al has published numerous articles in his field and received the Bradford Literary Award-CSNS in 2007. He hosts the "Texas Numismatic Study Group" in Houston every month and routinely works as an expert witness, prepares appraisals for various departments of the U.S. government, law offices, churches, and family estates.



Barbara Blades-Lines, ASA, ISA-CAPP

Barbara Blades-Lines has appraised Colonial to Contemporary furniture, paintings, silver, glass, ceramics, and maps, and promoted emerging artists, public art, and art education. A native Houstonian, Barbara graduated from the University of Texas and completed postgraduate studies with Christie's Education in London. Pursuing a career as an independent appraiser, Barbara founded Blades Appraisal Services in 1994 in Houston. She moved to Bermuda in 1996, continuing her practice there until 2012. She returned to Houston and joined the appraisal department at MKG Art Management, LLC, serving as Director of Deaccessions. In 2019 Barbara founded Blades Appraisal and Art Resources, LLC where she serves private, corporate, and institutional clients. Barbara also serves as the Secretary of the Houston Chapter of ASA.

# Mock Trial Expert Witnesses



Jeffrey Hays, ASA

Jeffrey Hays graduated from Rice University in 1978 after earning a degree in Economics and entered the local real estate industry the same year. Jeff is a member of the Houston Association of Realtors, is a licensed Texas Real Estate Broker, is a State Certified Residential Real Estate Appraiser and senior member of the American Society of Appraisers with ASA designation in Real Property. "Unconventional Wisdom" describes the independent thinking he and his company provide for a variety of individuals, estates, trusts, and institutions.

Jeff was born in the Rio Grande Valley and moved to Houston at an early age living in West University Place and Meyerland before his family relocated to Walnut Creek, California. Upon returning to Houston, they settled in the Memorial area along Buffalo Bayou in west Houston where Jeff graduated from Westchester High School. After attending Rice University, he was a resident of the Heights area for many years buying his first home at age 23 in Norhill. Later he returned to Memorial in the 1990's. Jeff enjoys sports and is an avid supporter of Rice University Athletics. He earned four Letters in baseball while attending Rice.

Jeff Hays has much experience in and knowledge about close-in neighborhoods and has a working knowledge of many suburban communities. Today, his firm primarily involved in the appraisal of high value homes in Houston neighborhoods of River Oaks, Memorial, West University, Tanglewood, and the Heights. He keeps up to date on growth and development trends shaping real estate markets and life across the greater Houston area and beyond. Urban economics including sustainable development and architecture are ongoing interest. He is currently a member of the HAR MLS Advisory Group.





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