

Stephen E. Dell, CVA

Executive Vice President and Senior Managing Director

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The Woodlands, Texas 77381
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Certifications

Certified Valuation Analyst

Education

The University of Texas at
Austin – Bachelor of Arts in
Economics (Finance emphasis)
May 2001

Professional Affiliations

National Association of Certified
Valuators and Analysts
Member

Licensing Executives Society
Member

Associations

Texas Children's Hospital, The
Woodlands
Advisory Council Member

The University of Texas Silver
Spurs Alumni Association
Life Member

Life Member, The University of
Texas Alumni Association
Life Member

Sigma Chi Fraternity Alumni
Association
Life Loyal Member

The University of Texas Silver
Spurs Alumni Association
Past Board Member

Texas Exes Alumni Association,
Montgomery County Chapter
Past Treasurer

Previous Employment

IPFC Corp.
May 2008 – Dec 2019

FTI Consulting, Inc.
Mar 2007 – Apr 2008
Jan 2002 – July 2006

The Staubach Company
Aug 2006 – Mar 2007

Technology & Financial
Consulting
Jun 2001 – Dec 2001

Stephen E. Dell is the Founder and President of NOVUM Consulting Group, an independent consulting firm that provides financial consulting services, financial analysis and valuation assessments for companies relating to intellectual property (such as patents) and financial analysis and valuation services for corporate disputes, licensing negotiations, litigation, and corporate finance purposes. NOVUM was acquired by Aperture LLC on August 1, 2024. Mr. Dell is an Executive Vice President at Aperture and a Senior Managing Director in the Economic Consulting services line.

Financial and Litigation Consulting Experience:

More than twenty years of professional experience in financial consulting and valuation services. The focus of Mr. Dell's experience has been assisting clients with complex intellectual property damage analysis, commercial disputes, and valuations. Mr. Dell has provided damages analysis, valuation, licensing negotiation, and financial consulting services to attorneys and corporate clients in more than 150 major litigation matters.

Experience in litigation and financial consulting involving:

- Valuations
- Sales determination and projection
- Licensing and royalty determinations
- Licensing negotiations
- Lost profit analysis
- Fixed and variable cost analysis
- Incremental profit analysis
- Financial statement analysis
- Product line profitability analysis
- Allocation of costs
- Manufacturing and marketing capacity
- Market assessments
- Business interruption losses
- Shareholder disputes
- Alter ego opinions
- Expert reports

Mr. Dell has significant involvement with company and law firm personnel in the identification of relevant market, financial and economic information, the development of damage analysis and related case strategy alternatives for use in the development of expert reports for negotiations, arbitrations, and trial proceedings, along with corresponding analyses and conclusions for litigation matters and other financial consulting engagements.

In addition to the litigation engagements in which Mr. Dell has been involved, he has also assisted corporate clients in the valuation and analysis of their intellectual property portfolios. Mr. Dell's experience in this area has included market assessments, royalty rate assessments, as well as valuation and financial analyses that have been used to determine monetization strategies best suited for his clients. In addition, Mr. Dell has assisted his clients in the negotiation of patent license agreements related to various technologies.

Outside of litigation Mr. Dell has been retained by privately held companies and private equity firms to provide opinions of value regarding patent assets, as well as patent monetization strategies, including royalty rate assessments and patent licensing programs. Further, he has provided expert opinions and analysis, in both litigation engagements as well as non-litigation consulting and advisory engagements, regarding the establishment of Fair Reasonable and Non-Discriminatory (FRAND) royalty rates related to telecommunications standards relevant to cellular handsets and consumer electronic devices.

Mr. Dell has also been engaged in matters involving general business and valuation issues, including breach of contract, business interruption claims, shareholder disputes, and valuations used for tax purposes. Mr. Dell also has extensive experience in the real estate industry and the valuation of real estate assets and is licensed in Texas by the Texas Real Estate Commission.

Mr. Dell has also been recognized as a leading economic and damages expert by IAM, having been selected to the *IAM Patent 1000: The World's Leading Patent Professionals* for multiple years.

Sample Industry Experience:

- Automotive
- Airlines
- Banking / Electronic Payments
- Cellular Standards
- Consumer Electronics
- Environmental
- Healthcare
- Internet / E-Commerce
- Mobile Phones / Telecommunications
- Medical Products
- Oil & Gas / Chemicals / Refining
- Real Estate
- Consumer Products / Retail
- Semiconductors
- Software
- Wireless Communications

Testimony Experience and Designations (as of October 2024):

KKG, LLC v. Reynolds Consumer Products, Inc., et al.,
U.S. District Court, Eastern District of Texas, Marshall Division
Case No. 2:11-cv-12, Filed: 01/12/2011; Report, Deposition, Trial

Imagine Enterprises, LLC v. Ce Soir Lingerie Co., Inc., et al.,
U.S. District Court, Central District of California
Case No. 2:11-cv-7291, Filed: 09/02/2011; Report, Deposition

IpLearn, LLC v. Blackboard Inc.,
U.S. District Court, District of Delaware
Case No. 1:11-cv-876, Filed: 09/27/2011; Report, Deposition

IpLearn, LLC v. K12 Inc.
U.S. District Court, District of Delaware,
Case No. 1:11-cv-1026, Filed: 10/26/2011; Report, Deposition

IpLearn, LLC v. Oracle Corporation., et al.,
U.S. District Court, District of Delaware
Case No. 1:11-cv-825, Filed: 09/15/2011; Report, Deposition

Louis Brandt v. Carter Myers, et al.,
District Court of Harris County, Texas, 129th Judicial District
Case No. 2012-22892, Filed: 05/22/2013; Disclosure of Opinions

Vehicle Interface Technologies, LLC v. Ford Motor Company
U.S. District Court, District of Delaware
Case No. 1:12-cv-1284, Filed: 10/05/2012; Report, Deposition

Vehicle Interface Technologies, LLC v. Jaguar Land Rover North America, LLC,
U.S. District Court, District of Delaware
Case No. 1:12-cv-1285, Filed: 10/05/2012; Report, Deposition

Maxim Integrated Products, Inc. v. Branch Banking and Trust Company, U.S.
District Court, Western District of Pennsylvania
Case No. 2:12-cv-945, Filed: 07/12/2012; Reports, Deposition

Maxim Integrated Products, Inc. v. JPMorgan Chase & Co., et al.,
U.S. District Court, Western District of Pennsylvania
Case No. 2:12-cv-1641, Filed 11/08/2012; Reports (2)

Semcon Tech, LLC v. Micron Technology, Inc.,
U.S. District Court, District of Delaware
Case No. 1:12-cv-532, Filed: 04/27/2012; Reports, Deposition

Solocron Media, LLC v. Verizon Communications Inc., et al.
U.S. District Court, Eastern District of Texas (Marshall)
Case No. 2:13-cv-1059, Filed: 12/06/2013; Reports (3)

IpLearn-Focus, LLC v. Microsoft Corporation
U.S. District Court, Northern District of California, San Francisco Division
Case No. 3:14-cv-151, Filed: 01/10/2014; Report, Deposition

Cronos Technologies, LLC v. Expedia, Inc.
U.S. District Court, District of Delaware
Case No. 1:13-cv-1538, Filed: 09/04/2013; Reports, Deposition

Cronos Technologies, LLC v. Priceline.com, Inc., et al.
U.S. District Court, District of Delaware
Case No. 1:13-cv-1541, Filed 09/04/2013; Reports, Deposition

Cronos Technologies, LLC v. Travelocity.com L.P.
U.S. District Court, District of Delaware
Case No. 1:13-cv-1544, Filed 09/04/2013; Reports, Deposition

Smart Skins LLC v. Microsoft Corporation
U.S. District Court, Western District of Washington at Seattle
Case No. 2:15-cv-544, Filed: 04/03/2015; Report, Deposition

Intellectual Ventures I LLC, et al. v. Ricoh Company, Ltd., et al.
U.S. District Court, District of Delaware
Case No. 1:13-cv-474, Filed: 05/25/2013; Reports, Deposition

Core Wireless Licensing S.A.R.L. v. Apple Inc.
U.S. District Court, Northern District of California, San Jose Division
Case No. 5:15-cv-5008, Filed: 11/03/2015; Reports, Deposition, Trial

Phoenix Licensing, L.L.C., and LPL Licensing, L.L.C. v. LifeLock, Inc.,
U.S. District Court, Eastern District of Texas (Marshall)
Case No. 2:15-cv-1375, Filed: 07/30/2015; Report

Phoenix Licensing, L.L.C., et al. v. TIAA-CREF Life Insurance Company
U.S. District Court, Eastern District of Texas, Marshall Division
Case No. 2:15-cv-1379, Filed: 07/30/2015; Report

511 Innovations, Inc. v. Samsung Telecommunications America, LLC, et al.
U.S. District Court, Eastern District of Texas, Marshall Division
Case No. 2:15-cv-1526, Filed: 09/14/2015; Reports, Deposition

511 Innovations, Inc. v. HTC America, Inc., et al.
U.S. District Court, Eastern District of Texas (Marshall)
Case No. 2:15-cv-1524, Filed: 09/14/2015; Reports, Deposition

FastVDO LLC v. AT&T Mobility LLC, et al.
U.S. District Court, Southern District of California, San Diego Division
Case No. 3:16-cv-385, Filed: 02/11/2016; Report, Deposition

FastVDO LLC v. LG Electronics Inc., et al.
U.S. District Court, Southern District of California, San Diego Division
Case No. 3:16-cv-386, Filed: 02/11/2016; Report, Deposition

FastVDO LLC v. Microsoft Mobile, Inc.
U.S. District Court, Southern District of California, San Diego Division
Case No. 3:16-cv-390, Filed: 02/11/2016; Report, Deposition

FastVDO LLC v. ZTE Corporation, et al.
U.S. District Court, Southern District of California, San Diego Division
Case No. 3:16-cv-394, Filed: 02/11/2016; Report, Deposition

FastVDO LLC v. Samsung Electronics America, Inc., et al.
U.S. District Court, Southern District of California, San Diego Division
Case No. 3:16-cv-395, Filed: 02/11/2016; Report, Deposition

FastVDO LLC v. Huawei Technologies Co., Ltd., et al.
U.S. District Court, Southern District of California, San Diego Division
Case No. 3:16-cv-396, Filed: 02/11/2016; Report, Deposition

VIA Technologies, Inc., et al. v. ASUS Computer International, et al.
U.S. District Court, Northern District of California, San Jose Division
Case No. 5:14-cv-3586, Filed: 08/07/2014; Report, Deposition

Realtime Data, LLC d/b/a IXO v. Rackspace US, Inc., et al.
U.S. District Court, Eastern District of Texas, Tyler Division
Case No. 6:16-cv-961, Filed: 06/29/2016; Report, Deposition

Straight Path IP Group, Inc. v. Apple Inc.
U.S. District Court, Northern District of California, San Francisco Division
Case No. 3:16-cv-3582, Filed: 06/24/2016; Reports, Deposition

Straight Path IP Group, Inc. v. Cisco Systems, Inc.
U.S. District Court, Northern District of California, San Francisco Division
Case No. 3:16-cv-3463, Filed: 06/21/2016; Reports, Deposition

Camsoft Data Systems, Inc. v. Southern Electronics Supply, Inc., et al.
District Court of East Baton Rouge Parish, Louisiana, 19th Judicial District
Docket No. 582,741, Filed: 02/10/2015; Report, Deposition, Reply Report

Oyster Optics, LLC v. Alcatel-Lucent USA, Inc.

U.S. District Court, Eastern District of Texas (Marshall)

Case No. 2:16-cv-1297, Filed: 11/23/2016; Reports (6), Depositions (3), Declaration

Oyster Optics, LLC v. Cisco Systems Inc., et al.

U.S. District Court, Eastern District of Texas (Marshall)

Case No. 2:16-cv-1301, Filed: 11/24/2016; Reports (6), Depositions (2), Declaration

Oyster Optics, LLC v. Coriant (USA) Inc., et al.

U.S. District Court, Eastern District of Texas, Marshall Division

Case No. 2:16-cv-1302, Filed: 11/24/2016; Reports (2), Deposition

Oyster Optics, LLC v. Fujitsu Network Communications Inc.

U.S. District Court, Eastern District of Texas, Marshall Division

Case No. 2:16-cv-1299, Filed: 11/23/2016; Reports (3), Deposition

Oyster Optics, LLC v. Huawei Technologies Co. Ltd., et al.

U.S. District Court, Eastern District of Texas, Marshall Division

Case No. 2:16-cv-1303, Filed: 11/24/2016; Reports (4), Depositions (2)

Oyster Optics, LLC v. Infinera Corporation

U.S. District Court, Eastern District of Texas, Marshall Division

Case No. 2:16-cv-1295, Filed: 11/23/2016; Reports (3), Deposition

Realtime Data LLC d/b/a IXO v. Echostar Corporation, et al.

U.S. District Court, Eastern District of Texas, Tyler Division

Case No. 6:17-cv-84, Filed: 02/14/2017; Reports, Depositions

Realtime Data LLC d/b/a IXO v. Synacor, Inc.

U.S. District Court, Eastern District of Texas, Tyler Division

Case No. 6:17-cv-126, Filed: 02/27/2017; Report

Broker Genius Inc. v. Seat Scouts LLC, et al.

U.S. District Court, Southern District of New York

Case No. 1:17-cv-8627, Filed: 11/07/2017; Declaration, Report, Deposition, Trial

Core Wireless Licensing S.A.R.L. v. LG Electronics, Inc., et al.

U.S. District Court, Eastern District of Texas, Marshall Division

Case No. 2:14-cv-912, Filed: 09/26/2014; Report, Deposition, Trial

Limestone Memory Systems LLC v. Micron Technology, Inc.

U.S. District Court, Central District of California, Southern Division

Case No. 6:15-cv-278, Filed: 02/17/2015; Reports, Deposition

Limestone Memory Systems LLC v. Acer America Corporation

U.S. District Court, Central District of California, Southern Division

Case No. 8:15-cv-653, Filed: 04/23/2015; Report, Deposition

Limestone Memory Systems LLC v. Dell Inc.,

U.S. District Court, Central District of California, Southern Division

Case No. 8:15-cv-648, Filed: 04/23/2015; Reports, Deposition

Limestone Memory Systems LLC v. Hewlett-Packard Company

U.S. District Court, Central District of California, Southern Division

Case No. 8:15-cv-652, Filed: 04/23/2015; Reports, Deposition

Limestone Memory Systems LLC v. Kingston Technology Co., Inc.
U.S. District Court, Central District of California, Southern Division
Case No.8:15-cv-654, Filed: 04/23/2015; Reports, Deposition

Limestone Memory Systems LLC v. Lenovo (United States) Inc.
U.S. District Court, Central District of California, Southern Division
Case No. 6:15-cv-650, Filed: 04/23/2015, Report, Deposition

Limestone Memory Systems LLC v. OCZ Storage Solutions, Inc.
U.S. District Court, Central District of California, Southern Division
Case No. 6:15-cv-658, Filed: 04/23/2015; Report, Deposition

Oyster Optics, LLC v. Infinera Corporation
U.S. District Court, Eastern District of Texas, Marshall Division
Case No. 2:18-cv-206, Filed: 05/15/2018; Reports (2)

Zeroclick, LLC v. Apple Inc.
U.S. District Court, Northern District of California, Oakland Division
Case No. 5:15-cv-4417, Filed: 09/25/2019; Reports (2), Declaration

Solas OLED Ltd. v. Samsung Display Co. Ltd, et al.
U.S. District Court, Eastern District of Texas, Marshall Division
Case No. 2:19-cv-152, Filed: 05/02/2019; Report, Deposition, Trial

British Telecommunications plc v. IAC/InterActiveCorp, Match Group, Inc., et al.
U.S. District Court for the District of Delaware
Case No. 1:18-cv-366, Filed: 03/03/2018; Reports (3)

Ramot at Tel Aviv University Ltd. v. Cisco Systems, Inc.
United States District Court for the Eastern District of Texas, Marshall Division
Civil Action 2:19-cv-00225, Filed: June 12, 2019; Report

Oyster Optics, LLC v. Infinera Corporation
U.S. District Court, Eastern District of Texas, Marshall Division
Case No. 2:19-cv-257, Filed: 07/29/2019; Reports (2), Depositions (2)

Ultravision Technologies, LLC v. GoVision, LLC
U.S. District Court, Eastern District of Texas, Marshall Division, Case No. 2:18-cv-100 [LEAD CASE], Filed: 03/27/2018; Reports (5), Depositions (3), Trial

Ultravision Technologies, LLC v. Holophane Europe Ltd, et al.
U.S. District Court, Eastern District of Texas, Marshall Division,
Case No. 2:19-cv-00291 [LEAD CASE], Filed: 08/26/2019; Reports (2); Deposition

Linksmart Wireless Technology, LLC v. GoGo, Inc., et al.
United States District Court for the Central District of California
Civil Action No. 8:18-cv-00654, Filed 04/20/2018, Reports (2), Depositions (2)

Linksmart Wireless Technology, LLC v. Panasonic Avionics Corp.
United States District Court for the Central District of California
Civil Action No. 8:18-cv-00662, Filed 04/20/2018, Report, Deposition

In the Matter of Certain Synthetic Roofing Underlayment Products and Components Thereof; Investigation No. 337-TA-1202, U.S. International Trade Commission, Washington D.C., Expert Report, Deposition

Acorn Semi, LLC v. Samsung Electronics, Co., Ltd., et al.

U.S. District Court, Eastern District of Texas, Marshall Division, Case No. 2:19-cv-347, Filed: 10/23/2019; Reports (2), Depositions (2), Trial, Declaration

Solas OLED Ltd. v. LG Display Co. Ltd, et al.

U.S. District Court, Western District of Texas, Waco Division

Case No. 2:19-cv-236, Filed: 04/01/2019; Report

Linksmart Wireless Technology, LLC v. Caesars Entertainment Corporation, et al.

United States District Court for the District of Nevada

Civil Action No. 8:18-cv-0862 [LEAD CASE], Filed 05/14/2018, Report

Oyster Optics, LLC v. Ciena Corporation

U.S. District Court, Northern District of California

Civil Action 4:20-cv-2354-JSW, Filed: 10/16/2017; Reports (2); Deposition

Realtime Adaptive Streaming LLC v. Sling TV LLC, et al.

United States District Court, District of Colorado

Case No. 1:17-cv-02097-RBJ, Filed 8/31/2017, Report, Deposition

Oyster Optics, LLC v. Cisco Systems Inc., et al.

U.S. District Court, Eastern District of Texas, Marshall Division

Case No. 2:20-cv-0211, Filed: 6/18/2020; Report, Deposition

Midwest Athletics and Sports Alliance LLC v. Xerox Corp.,

United States District Court for the Western District of New York

Case No. 6:19-cv-06036-EAW-MJP, Filed 12/13/2017; Reports (2), Deposition

Kirsch Research and Development, LLC v. DuPont de Nemours, Inc., et al., U.S.

District Court, Eastern District of Texas (Texarkana), Case No. 5:20-cv-0057

[Consolidated with Case No. 5:20-cv-0058], Filed: 4/24/2020; Reports (2)

Kirsch Research and Development, LLC v. Atlas Roofing Corporation,

U.S. District Court, Eastern District of Texas (Texarkana)

Case No. 5:20-cv-0055, Filed: 4/24/2020; Report

Godo Kaisha IP Bridge I v. Micron Technology Inc., et al. U.S.

District Court, Western District of Texas (Waco)

Case No. 6:20-cv-0178, Filed: 03/09/2020; Report, Deposition

RFCyber Corp., LLC v. Samsung Electronics Co. Ltd., et al.

United States District Court, Eastern District of Texas, Marshall Division

Case No. 2:20-cv-00335-JRG, Filed 10/16/2020; Report, Deposition

Proven Networks, LLC v. NetApp, Inc. et al.

United States District Court, Western District of Texas, Waco Division

Case No. 6:20-cv-00369-ADA, Filed 05/07/2020; Report, Deposition

Proven Networks, LLC v. SAP America, Inc. et al.

United States District Court, Eastern District of Texas, Marshall Division

Case No. 2:21-cv-00100-JRG, Filed 03/19/2021; Report

Solas OLED Ltd. v. Samsung Electronics Co. Ltd, et al.

United States District Court, Eastern District of Texas (Marshall)

Case No. 2:21-cv-105, Filed: 03/22/2021; Report, Deposition

Lone Star Technological Innovations, LLC v. ASUSTek Computer, Inc. United States District Court, Eastern District of Texas (Tyler)
Case No. 6:19-cv-0059, Filed 2/20/2019, Report, Trial

XR Communications LLC dba Vivato Technologies v. D-Link Systems, Inc.
United States District Court, Central District of California (Santa Ana), Case No. 8:17-cv-00596 [Lead Case]; Filed April 3, 2017, Reports (6), Depositions (5)

Dropbox, Inc. v. Motion Offense, LLC
United States District Court, Western District of Texas (Waco), Case No. 6:20-cv-00251 and 6:21-cv-00758; Filed August 4, 2019, Report, Deposition, Trial

CPC Patent Technologies Pty Ltd. v. HMD Global Oy
United States District Court, Western District of Texas (Waco)
Case No. 2:21-cv-0165, Filed February 23, 2021, Report, Deposition

Rigby Refining, LLC and Māqēma Technology Licensing LLC v. Wood Group USA, Inc. and Marea Energy Partners, LLC, American Arbitration Association, Arbitration No. 01-21-0016-1700, Originally filed March 8, 2021 (Texas State Court), Report

Staton Techiya and Synergy IP Corporation v. Samsung Electronics Co., Ltd. et al.
United States District Court, Eastern District of Texas (Marshall), Case No. 2:21-cv-00413 and 2:22-cv-0053, Filed November 5, 2021, Report, Deposition

Finjan, LLC v. Palo Alto Networks, Inc.
United States District Court, Northern District of California (San Francisco), Civil Action No. 3:14-cv-04908, Filed November 4, 2014, Report, Deposition

Sable Networks, Inc. and Sable IP, LLC v. Cloudflare, Inc.
United States District Court, Western District of Texas (Waco)
Case No. 6:21-cv-0261, Filed March 15, 2021, Report, Deposition, Trial

GoTV Streaming, LLC v. Netflix, Inc.
United States District Court, Central District of California (Western Division)
Case No. 2:22-cv-7556, Filed October 17, 2022, Report, Deposition, Trial

XR Communications LLC dba Vivato Technologies v. ASUSTeK Computer, Inc.
United States District Court, Western District of Texas (Waco)
Case No. 6:21-cv-0622; Filed June 16, 2021, Reports (2)

G+ Communications, LLC v. Samsung Electronics Co., Ltd. et al.
United States District Court, Eastern District of Texas (Marshall)
Case No. 2:22-cv-0078, Filed March 14, 2022, Reports (4), Deposition, Trial (2)

Entropic Communications, LLC v. Charter Communications, Inc., et al.
United States District Court, Eastern District of Texas (Marshall),
Case No. 2:22-cv-125, Filed April 27, 2022, Reports (4), Deposition

RFCyber Corp, LLC v. Apple, Inc.
United States District Court, Western District of Texas (Waco),
Case No. 6:21-cv-0916; Filed September 7, 2021, Report, Deposition

Smart Path Connections, LLC v. Nokia of America Corporation
United States District Court, Eastern District of Texas (Marshall),
Case No. 2:22-cv-296, Filed August 3, 2022, Report, Deposition, Trial

Correct Transmission, LLC v. Nokia of America Corporation
United States District Court, Eastern District of Texas (Marshall),
Case No. 2:22-cv-0343, Filed September 2, 2022, Report, Deposition

NextGen Innovations, LLC v. Infinera Corporation

United States District Court, Eastern District of Texas (Marshall),
Case No. 2:22-cv-0306, Filed August 9, 2022, Report, Deposition

NextGen Innovations, LLC v. AT&T Services, Inc and AT&T Corp.

United States District Court, Eastern District of Texas (Marshall),
Case No. 2:22-cv-0308, Filed August 9, 2022, Report, Deposition

NextGen Innovations, LLC v. Nokia Corporation of America, et al.

United States District Court, Eastern District of Texas (Marshall),
Case No. 2:22-cv-0309, Filed August 9, 2022, Report

Katana Silicon Technologies, LLC v. GlobalFoundries, Inc.

United States District Court, Western District of Texas (Austin),
Case No. 6:22-cv-0191; Filed February 24, 2022, Report

Correct Transmission, LLC v. Juniper Networks, Inc.

United States District Court, Northern District of California (San Francisco),
Case No. 3:21-cv-9284, Filed July 23, 2020, Report

Cynosure LLC, et al. v. Reveal Lasers, LLC

United States District Court, District of Massachusetts,
Civil Action 22-cv-11176, Filed July 20, 2022, Report, Trial

Cobblestone Wireless, LLC v. AT&T Inc.; AT&T Services, Inc., AT&T Mobility, et al.

United States District Court, Eastern District of Texas (Marshall),
Case No. 2:22-cv-0474, Filed December 15, 2022, Report, Deposition

Cobblestone Wireless, LLC v. T-Mobile USA, Inc. and T-Mobile US, Inc.

United States District Court, Eastern District of Texas (Marshall),
Case No. 2:22-cv-0477, Filed December 16, 2022, Report, Deposition

Cobblestone Wireless, LLC v. Verizon Communications, Inc., et al.

United States District Court, Eastern District of Texas (Marshall),
Case No. 2:22-cv-0478, Filed December 16, 2022, Report, Deposition

Advanced Coding Technologies LLC v. Samsung Electronics Co., Ltd. et al.

United States District Court, Eastern District of Texas (Marshall)
Case No. 2:22-cv-0499, Filed December 22, 2022, Report, Deposition

Resonant Systems, Inc. d/b/a RevelHMI v. Sony Group Corporation, et al.

United States District Court, Eastern District of Texas (Marshall)
Case No. 2:22-cv-0424, Filed October 26, 2022, Report, Deposition

Daingean Technologies, Ltd. v. AT&T Inc.; AT&T Corp., et al.

United States District Court, Eastern District of Texas (Marshall),
Case No. 2:23-cv-0123, Filed March 24, 2023, Report, Deposition

Headwater Research, LLC v. Samsung Electronics, Co. Ltd. et al.

United States District Court, Eastern District of Texas (Marshall),
Case No. 2:23-cv-0103, Filed March 10, 2023, Report, Deposition

Other Selected Litigation Consulting Experience:

Advanced Micro Devices v. Samsung

Patent infringement matter involving methods for semiconductor manufacturing and “trenching” techniques in insulating layers of semiconductors/wafers during the manufacturing process

AVID Identification Systems, Inc. v. Philips Semiconductors, Inc.

Patent infringement matter involving radio frequency identification (RFID) technology

Baker Hughes, Inc., et al. v. Daniel S. Homa, et al.

Trade Secret theft matter involving fiber optic technologies used in down hole oil & gas applications

BMC Software, Inc. v. NetIQ Corp.

Patent infringement dispute involving distributed performance management software

Boston Scientific, Inc. v. ev3, LLC

Patent infringement dispute involving embolic protection devices used to remove debris released during endovascular procedures

Broadcom Corp. v. Microtune, Inc.

Patent infringement dispute involving radio frequency tuner technology utilized in cable modems and digital set-top boxes

Herman Miller, Inc. v. Teknion Corp, et al.

Patent infringement matter involving technology associated with Herman Miller’s Aeron ergonomic mesh task chair

LG Electronics v. Whirlpool Corporation

Patent infringement matters involving various technologies used in refrigerators, including an in-the-door ice dispensing system

Oceaneering International, Inc. v. Trendsetter Engineering, Inc.

Patent infringement matter related to subsea flow line connection systems

OurHome, Inc. v. Reliant Energy, Inc., et al.

Trade secret misappropriation matter involving the operation of a referral-based E-commerce website

Regents of the University of Minnesota v. CenterPoint Energy

Environmental remediation matter regarding the disposal of hazardous substances and waste

simplehuman, LLC v. Volume Distributors, Inc.

Patent infringement matter related to design and manufacturing of household consumer products

Slyce Acquisition, Inc. v. Syte - Visual Conception Ltd.

Patent infringement matter related to visual presentation and navigation of content using data-based image analysis via smartphone applications

SourceProse Corp. v. Fidelity National Financial, Inc., et al.

Patent infringement matter related to the automated determination of flood zones for residential/commercial property

Selected Valuation and Licensing/Advisory Experience:

5G Cellular Standard FRAND Licensing Analysis and Negotiation

Financial advisor and consultant in the analysis and determination of FRAND royalty rates and licensing analysis and negotiation with a leading consumer electronics manufacturer relating to standard essential patent portfolio covering the 5G cellular standard

Consumer Electronics Wireless Communications Patent Licensing Assessment

Analysis and determination of appropriate FRAND royalty rates applicable to DLNA/UPnP standards for development of licensing program and licensing negotiations with major consumer electronics manufacturers

Enterprise Network/Data Optimization Patent Portfolio Market Valuation Assessment

Market assessment and valuation related to network optimization patent portfolio used in assisting in the sale of the patent assets

Electronic/Mobile Payment Patent Portfolio Licensing Advisory and Negotiations

Financial modeling and analysis related to patent portfolio covering electronic/mobile payment technologies. Assisted in royalty rate determinations and negotiations of license agreements

OLED Display Patent Portfolio Valuation

Quarterly valuation assignment associated with investment in a 700+ patent portfolio related to organic light emitting diode technologies for the purpose of ongoing internal reporting requirements

Streaming Media and Digital Rights Management Patent Licensing Engagement

Assistance in the evaluation of a licensing proposal and negotiations of potential license agreement related to streaming internet media and digital rights management technologies, including the determination of applicable financial terms of the agreement, royalty rates, and relevant revenue streams to be licensed

Patent Valuation for Purposes of Loan Collateralization

Valuation of patent asset related to modular outdoor kitchens for the purpose of loan collateralization

Patent Licensing and Monetization Engagement Related to Audio Patent Portfolio

Licensing and financial advisor in patent monetization engagement involving 150+ patent portfolio related to audio technologies used in major consumer electronics products, including smartphones and wireless earbuds. Determination of applicable royalty rates, market segments, patent licensing and monetization strategies and negotiation assistance

Articles and Presentations:

“Baked-In Apportionment: Hotter Than a Texas Chili Cook-Off” – Panelist at the Eastern District of Texas Bench Bar Conference, Plano, Texas, October 2022

“Damages, Apportionment, and Lost Profits in Patent Cases” – Speaker at University of Texas Advanced Patent Law Institute, November 2018

“Current Issues in Patent Damages” Litigation Services Workshop – Louisiana Society of Certified Public Accountants, October 2010

“Current Issues in IP Damages” CLE presentation, July/November 2009

“Measuring the Value of Damages in IP Cases” – Instructor at FTI Internal Training Seminar, June 2007

“Analytical Approach” as a Technique to Determine a Reasonable Royalty”- Chapter 11, Economic Damages in Intellectual Property: A Hands On Guide To Litigation, Slottje, et al., June 2006

“Patent Damages” – Instructor at FTI Internal Training Seminar, February 2004

“The Entire Market Value Rule” – Speaker for the Annual FTI National Intellectual Property Meeting, October 2003