



# J. Eric Peterson, Jr., J.D., MBA

The Insurance Archaeologist™ | "I dig for buried treasure in insurance policies"

**J. Eric Peterson Jr., J.D., MBA**

**Insurance Expert Witness**

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## CURRICULUM VITAE

### Current

- Litigation and Claims Management
- Insurance Bad Faith
- Risk Management Consulting
- Captive Insurance Management
- Agent and Broker Standard of Care
- Insurance Policy Review

### Licenses/Certifications

- Property and Casualty Insurance Producer/Broker – Various states, including but not limited to, Arizona, Ohio, Wyoming, South Carolina and Tennessee. Last active license 2013.
- Adjuster – Lines of Authority - Property and Casualty – Various states, including but not limited to, Alabama, Arkansas, Arizona, Connecticut, Delaware, Florida, Georgia, Idaho, Indiana, Kentucky, Louisiana, Maine, Michigan, Minnesota, Mississippi, Montana, North Carolina, New Hampshire, New Mexico, Nevada, New York, Oklahoma, Oregon, Rhode Island, South Carolina, Texas, Utah, Vermont, Washington, West Virginia, Wyoming. Last active license 2022.
- Certified Risk Manager

### Areas of Expertise

Insurance Policy Coverage Opinions  
Claims Handling  
General Liability Policies  
Construction Defects  
Litigation Management  
Risk Management Standards  
Sexual Misconduct Cases

Bad Faith  
Third Party Administrator Standards  
Captive Insurance Management  
Agent & Broker Standards and Practices  
Unfair Claims and Settlement Practices  
Directors & Officers Liability  
Errors & Omissions

### Education

Juris Doctor - Cumberland School of Law, Samford University – Birmingham, AL - 2011

Masters of Business Administration, Global Business Management – Tempe, AZ – 2000

Certificate in Risk Management – Tempe, AZ - 1994

Bachelors of Science, Business Management – California Lutheran University – Thousand Oaks, CA - 1992

Associates Degree – Arizona State University – Tempe, AZ – 1990

## Experience

### **Expert Witness Partners, PLLC** – 2019-Current - Nashville, TN and Phoenix, AZ

Partner. Providing Expert Witness and Risk Management Consulting services as “The Insurance Archaeologist <sup>TM</sup>”.

### **Sedgwick** – 2017-2021 - Nashville, TN

Litigation Manager and Claims Team Lead for Sedgwick. Responsible for accounts including but not limited to, USA Cycling, Major League Baseball, Office Depot, Coca-Cola and FedEx Supply. Third party administrator handling exposures for product liability, general liability, commercial truck and auto liability, catastrophic bodily injury claims and construction defects. Point person for securing new Sedgwick TPA accounts for clients with captive insurance programs. Monitor legal precedents and claims handling requirements/best practices for all 50 states. Research and ensure compliance of specialized risk management programs and claims handling directives for individual clients.

### **Norseman Consulting Group, Inc.**, - 2016-2017 – Nashville, TN

Director of Trinity American Insurance, a Delaware Captive Insurance Company, providing re-insurance for captive insurance carriers.

### **Gallagher Bassett Services, Inc.**, - 2013-2016 - Brentwood, TN

On-Site vendor assigned to Tractor Supply Company corporate headquarters in Brentwood, TN as Senior Resolution Manager heading a team of adjusters responsible for the general liability claims against all Tractor Supply Company retail locations. Responsibilities included liability coverage analysis, review of commercial property lease agreements for all non-owned retail locations, attendance at all mediation and trial proceedings on behalf of TSC. Additional responsibilities included: Providing recommendations and coordinating the implementation of loss prevention measures with local retail location managers and employees. Providing annual in-person review of individual store loss history with retail location store managers. Liability policy review and providing written recommendations of coverage applicability. Supervising the set-up, investigation and establishment of over 200 bodily injury and property damage claims maintaining nearly a 100% closure rate.

### **Risk Management Services, Inc.**, - 2003-2013 - Tempe, AZ

In charge of the claims and litigation for all RMS Clients. Assisted in the development of custom risk management solutions for individual clients, including identifying specific risks and drafting custom insurance policies and litigation management programs to mitigate exposures and reduce legal defense expenses.

Directors and Officers Liability policy review and claims handling.

Property & Casualty Insurance Broker.

Coordinate and assist with yearly claims and actuarial reviews, audits and reports.

Managed construction defects litigation for commercial property developer Desert Troon Company.

Implemented and managed loss control and risk management procedures that resulted in the dramatic reduction of catastrophic bodily injury claims, reducing high deductible payouts thereby preserving the client's loss reserves and contributing substantially to portfolio growth.

Over 20 years-experience in litigation management for USA Swimming, (Amateur and Olympic Level, USA Swimming is the National Governing Body sanctioned by the U.S. Olympic Committee under authority of the Federal Ted Stevens Amateur Athletic Act). Cases involved property damage, catastrophic bodily injury, sexual misconduct, Federal Anti-Trust and Directors and Officers Liability.

Managed captive insurance company for MVT Services Trucking Company based out of Las Cruces, NM including Cargo and Physical Damage losses for over 500 owner operator and independent drivers along with specialty risk programs.

**Peak Insurance Group, Inc., - 1997-2003 - Phoenix, AZ**

Established specialized risk management programs for clients with unique and difficult risks. Property & Casualty Broker. Provided industry specific, specialized programs for multiple clients including setting up and implementing litigation management programs. Licensed field adjuster for Peak Insurance Group. Responsible for vetting various business affiliations and employee hires including due diligence and background checks.

**Anderson Law Offices – 1993-1994 - Jacksonville, FL**

Assigned by Jardine Matheson North America (for whom Anderson Law was lead trial counsel) to assist in the defense of several clients. Responsibilities included legal research and trial preparation for Board Certified Trial Attorney. Duties also included investigations, deposition prep, expert witness identification and vetting.

**Jardine Matheson North America- 1992-1997 - Phoenix, AZ**

Brokered new commercial insurance accounts and serviced books of business for Account Executives. Introduction to claims management for self-insured clients. Licensed property and casualty insurance producer and adjuster.

**Associations/Volunteer Work**

Williamson County C.A.S.A (Court Appointed Special Advocate) for Williamson County, TN Juvenile Court. Volunteer Court Appointed Special Advocate for abused and neglected children. Franklin, TN.

Literacy Council of Williamson County - Volunteer instructor of ESL (English as a second language) for advanced English - Franklin, TN.

Former Member of the Men's Art Council, Phoenix Art Museum, Arizona.

**Expert Witness Trial and Deposition Case List**

Jane Doe v. US Swimming, Missouri Valley Swimming, Lexington/AIG et al. Case 0516-CV-23636, Jackson County Circuit Court, Kansas City, Missouri.

Ethan's Glenn Community Association, Inc. v. USI Southwest, Inc. Case No. 2019-15843 – 281<sup>st</sup> Judicial District, Harris County, TX.

William G. West, Trustee of Paula Douglass v. USI Southwest, Inc., et al. Case No. 2019-60723 – District Court 270<sup>th</sup> Judicial District, Harris County, TX (2021-2022)

Spencer Jackson v. SPC Leasing, et al. Opinion Only – No suit filed to date.

Arizona Broadway Theater v. Glendale Insurance, et al. Superior Court, County of Maricopa Case No. – CV 2020-010495.

KLOS v. Glendale Insurance, et al. Superior Court, County of Maricopa Case No. – CV 2020-010495.

Pintar v. AAA Fire & Casualty, United States District Court, District of Nevada Case No. - 2:21-cv-00652-GMN-EJY.

Orozco v. Lennar and Estrada Construction v. Jansick Insurance Group, Superior Court, County of Maricopa Case No - CV 2020-016485.

Craig Zuchelkowski v. Geico, United States District Court, District of Nevada Case No – 2:20-cv-02182-GMN-EJY.

Palmer v. Angel Insurance, South Carolina.

Rommel McCants v. Allstate Insurance Company, South Carolina, County of Orangeburg, Case No. – 2020CP3801114.

Robert and Joanne George v. State Farm, Arizona, Opinion provided for Examination under Oath.

Cynthia Boatright, as Representative of the Estate of Caroline Ekong and John Etim, Kokomma Ekong, and Kaeini Ekong v. Christopher Frick, James Frick and Cynthia Frick, Superior Court of Delaware, Case No. – N17C-09-180 CEB.

Dupre v. Great American Insurance, Louisiana Case No. - Case No. 2019-002055 Div. B.

I have been in the insurance industry for over 30 years, working as a Licensed Commercial Property and Casualty Insurance Broker, Licensed Property and Casualty Insurance Adjuster, Litigation Manager for wholly owned, Captive Insurance companies as well as handling and managing construction defects litigation and claims. I have led teams handling Property and Casualty Insurance claims for two of the country's top Third-Party Administrative Companies and secured new TPA accounts. I have held resident Property and Casualty Insurance Broker Licenses in Arizona and Tennessee as well as non-resident licenses in several other states, including but not limited to Ohio, South Carolina and Wyoming and have been licensed as an adjuster, both resident and non-resident, in nearly all 50 states including but not limited to, Arizona, New York, Florida, California and Texas.