

Exhibit 6

Fonti Fee Declaration

**UNITED STATES DISTRICT COURT
SOUTHERN DISTRICT OF NEW YORK**

HUMBERTO LOZADA and OKLAHOMA
FIREFIGHTERS PENSION AND
RETIREMENT SYSTEM Individually and on
Behalf of All Others Similarly Situated,

Plaintiffs,

v.

TASKUS, INC., BRYCE MADDOCK,
JASPAR WEIR, BALAJI SEKAR,
AMIT DIXIT, MUKESH MEHTA,
SUSIR KUMAR, JACQUELINE D. RESES,
and BCP FC AGGREGATOR L.P.,

Defendants.

Case No. 1:22-cv-01479-JPC-GS

CLASS ACTION

**DECLARATION OF JOSEPH A. FONTI IN SUPPORT OF LEAD COUNSEL'S
MOTION FOR ATTORNEYS' FEES, LITIGATION EXPENSES, AND
PLAINTIFFS' REASONABLE COSTS AND EXPENSES,
FILED ON BEHALF OF BLEICHMAR FONTI & AULD LLP**

JOSEPH A. FONTI declares under penalty of perjury, pursuant to 28 U.S.C. § 1746, that the following is true:

1. I am a partner at Bleichmar Fonti & Auld LLP (“Lead Counsel” or “BFA”), Court-appointed Lead Counsel in the above-captioned action (the “Litigation”).¹

2. I submit this declaration in support of Lead Counsel’s Motion for Attorneys’ Fees, Litigation Expenses, and Plaintiffs’ Reasonable Costs and Expenses. I have personal knowledge of the matters set forth herein based on my active participation in the prosecution and settlement of the Litigation.

I. BFA’S WORK, RATES, AND LODESTAR

3. BFA is highly qualified and experienced in prosecuting securities class actions, as well as shareholder derivative actions, and complex antitrust and consumer class actions. Attached hereto as **Exhibit 1** is BFA’s firm resume, which includes biographical information about attorneys and staff members and information about the firm’s philosophy, organization, and successes.

4. Attached hereto as **Exhibit 2** is a list of BFA attorneys and professional support staff for whom fees are sought in this Litigation. Exhibit 2 also provides further information about each individual’s qualifications, experience, and role in the litigation.

5. As Lead Counsel in this Litigation, BFA performed the majority of the work necessary to prosecute the Litigation. That work is further detailed in the Fonti Declaration filed

¹ Capitalized terms not defined herein have the meanings stated in the Stipulation of Settlement, dated May 27, 2025 (the “Stipulation”) (ECF 187-1) and the Declaration of Joseph A. Fonti in Support of (I) Plaintiffs’ Motion for Final Approval of Class Action Settlement and Approval of Plan of Allocation, and (II) Lead Counsel’s Motion for Attorneys’ Fees, Litigation Expenses, and Plaintiffs’ Reasonable Costs and Expenses (the “Fonti Declaration” or “Fonti Decl.”).

contemporaneously herewith, which also provides the amount of time and lodestar Plaintiffs' Counsel devoted to the Litigation by category.

6. Table 1 below is a schedule summarizing the amount of time spent by each of BFA's attorneys and professional support staff from the Litigation's inception through and including August 31, 2025, the rates applicable to each individual, and a lodestar calculation for each individual.

7. Table 1 is based on contemporaneous time records prepared and maintained by BFA in the ordinary course. As the lead partner responsible for supervising BFA's work on this case, I supervised the review of these time records to prepare this declaration. The purpose of this review was to confirm both the accuracy of the time entries and the necessity for, and reasonableness of, the time committed to the Litigation.

8. As a result of this review, Plaintiffs' Counsel made reductions in the exercise of billing judgment, including excluding all time for BFA personnel who were less involved in the case (including all who billed fewer than 50 hours to the Litigation), and time spent attending depositions where more than two BFA attorneys were present. Table 1 also excludes all time concerning fee and expense award matters.

9. Following the review and the adjustments made, as set forth in Table 1, BFA attorneys and professional support staff devoted 8,191.8 hours to this Litigation from inception through and including August 31, 2025. The total lodestar reflected in Table 1 for that period is \$6,725,436. I believe that the time reflected in BFA's lodestar calculation, as set forth herein, is reasonable in amount and was necessary for the effective and efficient prosecution and resolution of the Litigation.

TABLE 1

Timekeeper Name	Position	Hours	Hourly Rate	Lodestar
Joseph Baier	Former Associate	259.2	\$730	189,216
Benjamin F. Burry	Partner	1,258	\$1,095	\$1,377,510
Masiel Feliz	Paralegal	190.3	\$415	\$78,974
Joseph A. Fonti	Partner	338.15	\$1,310	\$442,976
Frederick William Green	Associate	791.1	\$685	\$541,904
Joseph Guglielmelli	Staff Attorney	653.2	\$520	\$339,664
Mathew Hough	Former Associate	465.85	\$665	\$309,790
Jennifer Jurmark	Senior Discovery Operations Manager	525.2	\$575	\$301,990
Evan A. Kubota	Partner	863.45	\$1,095	\$945,478
Nancy Kulesa	Partner	137.9	\$1,095	\$151,001
Peter Patrikios	Projects Associate	694	\$575	\$399,050
Thayne Stoddard	Of Counsel	1,300.55	\$940	\$1,222,517
Franklyn Williams	Senior Projects Associate	714.9	\$595	\$425,366
TOTALS		8,191.8		\$6,725,436

10. As reflected in Table 1, the hourly rates for BFA attorneys and professional support staff range from \$415 to \$1,310. Current rates are used for current personnel; for attorneys and professional support staff who are no longer employed by BFA, the hourly rate used is the hourly rate for such employee in his or her final year of employment by BFA.

11. BFA's rates are the usual and customary rates set by BFA for each individual. Different timekeepers within the same employment category (*e.g.*, partner, associate) may have different rates depending on their respective years of experience, years at the firm, years in current position, relevant experience, relevant expertise, and/or rates of similarly situated individuals at BFA or at peer firms. BFA's rates are comparable to the rates set by peer firms for attorneys and staff of similar skill and experience.

12. Courts across the country have consistently held that BFA's hourly rates are reasonable. *See, e.g., Police Ret. Sys. of St. Louis v. Granite Constr. Inc.*, No. C 19-04744-WHA,

2022 WL 816473, at *9 (N.D. Cal. Mar. 17, 2022) (“This order accepts [BFA’s] claimed rates as generally tracking the going rate for those with the same levels of skill and experience in our geographic region.”); Settlement Approval Hearing Transcript, *In re Teva Sec. Litig.*, No. 3:17-cv-00558-SRU (D. Conn. June 2, 2022), 28-29 (granting fee award requested and accepting BFA’s rates as reasonable).

Dated: September 10, 2025

/s/ Joseph A. Fonti

Joseph A. Fonti

EXHIBIT 1

Lozada v. TaskUs, Inc.,
No. 1:22-cv-01479

BFA FIRM RESUME



FIRM RESUME



OVERVIEW

Bleichmar Fonti & Auld LLP (“BFA” or the “Firm”) is a leading class action law firm founded in 2014 and based in New York City with additional offices in Oakland, California; Wilmington, Delaware; Toronto, Ontario; and Westchester, New York. The Firm focuses on securities fraud class actions and other investment and consumer-related matters on behalf of a wide range of domestic and international clients, including some of the largest institutional investors and asset managers in the world.

Since 2014, BFA has recovered over \$2 billion for investors. This track record reflects the long and extensive experience of the Firm’s partners in the last two decades prosecuting securities class actions. Indeed, BFA has repeatedly been in the top 10 and 15 in total monetary recoveries in securities class actions. In 2022, for example, BFA’s \$420 million settlement with Teva Pharmaceutical Industries, Ltd. was number two in a list of the Top U.S. Shareholder Class Actions of 2022 as reported by ISS Insights, and, with BFA’s \$129 settlement with Granite Construction, Inc., BFA was the only law firm to place twice on ISS’s top 10 list for 2022 as sole lead counsel. These results also placed BFA as a “Top 5” Plaintiff Law Firm based on 2022 securities settlements achieved, as reported by ISS.

BFA’s founding partners have worked together for nearly two decades, recovering billions of dollars for investors. In the last ten years, BFA’s partners have represented lead plaintiffs in more than a dozen securities class actions. Our partners are supported by a team recruited for their excellence and dedication to our practice, as they carefully built a talented team who have collaborated for years, ensuring a wealth of experience to draw on for our clients.

Our attorneys are nationally recognized as leading litigators in the field of securities litigation, and our achievements have been profiled in a variety of national publications, including *The Wall Street Journal*, *The New York Times*, *Law 360*, the *National Law Journal’s* Plaintiffs’ Hot List, *Lawdragon*, and *The Legal 500*. We are also frequently asked to comment on breaking developments in financial fraud, securities, and other investment-related issues.



SECURITIES LITIGATION HIGHLIGHTS

BFA partners have represented lead plaintiffs in dozens of securities class actions, as well as investors in direct actions, including the cases featured below.

Ontario Teachers' Pension Plan Board, et al. v. Teva Pharmaceutical Industries Ltd. et al.

- District of Connecticut, No. 17-cv-00558
- Clients: Ontario Teachers' Pension Plan Board and Anchorage Police and Fire Retirement System
- Attorneys: Joseph A. Fonti, Javier Bleichmar, Evan A. Kubota, Benjamin F. Burry, Sara Pildis Simnowitz, Thayne Stoddard

**Total Settlement:
\$420 Million**

Background: Plaintiffs alleged that the company and its senior management made materially false and misleading statements that concealed that Teva had engaged in a multi-year scheme to exponentially increase generic drug prices across its portfolio, in some instances by more than 1000%. Often, these increases were in lock-step with so-called competitors.

BFA's Role: BFA was sole Lead Counsel for the Class and Court-appointed Lead Plaintiff Ontario Teachers' and named plaintiff Anchorage Police and Fire Retirement System.

Status: On June 2, 2022, BFA secured final approval of the \$420 million settlement after five years of hard-fought litigation, including the Court's certification of the class and the Second Circuit's denial of defendants' attempt to appeal class certification, completing intensive fact and expert discovery, and preparing a summary judgment motion. This represents the second largest class settlement in the history of the District of Connecticut (where the case was pending), the fourth-largest within the Second Circuit (excluding cases arising from restatements or the 2008-09 financial crisis), and among the five largest securities settlements against a pharmaceutical manufacturer. No objections were filed. BFA's effort required over 77,000 hours of work, investing nearly \$10 million in litigation and expert expenses, and navigating both Teva's financial distress and competing civil and criminal actions arising from the same alleged pricing conduct (including Teva USA's 2020 indictment by the U.S. Department of Justice). The resulting \$420 million settlement was the first meaningful recovery related to this conduct.

In approving the settlement, Judge Underhill described Teva as "the most complex securities case I've ever had" and a "remarkably complex" case that "required analysis of a very broad portfolio of drugs." Judge Underhill praised BFA's work,



stating, “The quality of the representation was excellent in the face of very quality defense . . . This was not a case that every law firm could handle, and I think it was done exceptionally well.”

The Police Retirement System of St. Louis v. Granite Construction Incorporated, et al.

- Northern District of California, No. 19-cv-04744
- Client: The Police Retirement System of St. Louis
- Attorneys: George N. Bauer, Javier Bleichmar, Benjamin F. Burry, Evan A. Kubota, Ross Shikowitz, Sara Pildis Simnowitz, Thayne Stoddard

**Total Settlement:
\$129 Million**

Background: Plaintiffs alleged that Granite and its senior management fraudulently misrepresented the impact of several of the company’s largest joint venture construction projects on Granite’s business. Specifically, plaintiffs asserted that Granite and its senior management understated the significant cost overruns and schedule delays the Company was experiencing as well as their impact on Granite’s financial statements.

BFA’s Role: BFA was sole Lead Counsel for Court-appointed Lead Plaintiff the Police Retirement System of St. Louis.

Status: The Court appointed the Police Retirement System of St. Louis on November 26, 2019 and approved its choice of BFA as Lead Counsel on January 16, 2020. BFA filed an amended complaint on February 20, 2020. In May 2020, Judge Alsup denied defendants’ motion to dismiss. In January 2021, Judge Alsup certified the class, naming the Police Retirement System of St. Louis as class representative and BFA as class counsel. After beginning discovery and taking a number of depositions, the parties reached a \$129 million settlement.

On March 17, 2022, Judge Alsup granted final approval of the settlement. In approving the settlement, Judge Alsup noted that the “\$129 million settlement flowed from the hard work of class counsel, the discovery they took, the investigations they did, and their victories in court.” He further observed that “the \$129 million settlement is almost entirely the result of the hard work of class counsel,” that “[c]lass counsel investigated this case in great depth,” and that class counsel’s efforts “plausibly led to a restatement” whereby Granite admitted that its financial statements could no longer be relied upon.

At the time, the settlement was the third largest approved in the Northern District of California in the last decade. The settlement promises to compensate investors for 20-30% of their estimated damages, which exceeds by nearly 400% the average rate of recovery in cases alleging claims under Section 10(b) of the Securities Exchange Act of 1934.



MTA v. Allianz Global Investors U.S., L.L.C.

- Southern District of New York, No. 20-CV-7842
- Client: Metropolitan Transportation Authority
- Attorneys: Javier Bleichmar, George Bauer

Settled

Background: Since 2008, the Metropolitan Transportation Authority (“MTA”) invested nearly \$200 million in Allianz Global Investor’s (“AllianzGI”) Structured Alpha funds. Due to AllianzGI’s negligent and imprudent trading strategies and its failure to implement adequate risk management procedures, despite its commitment to do so, the MTA lost over 90% of its investment. AllianzGI’s failure cost the MTA and similar institutional investors hundreds of millions of dollars.

BFA’s Role: BFA represented the MTA in their suit against AllianzGI.

Status: BFA filed a complaint against AllianzGI on behalf of the MTA in September 2020. On September 30, 2021, the Court denied defendants’ motion to dismiss. The parties reached a confidential settlement on May 17, 2022.

In re Talis Biomedical Securities Litigation

- Northern District of California, No. 3:22-cv-00105
- Client: Individual Investors
- Attorneys: Joseph A. Fonti, Evan Kubota

Total Settlement:
\$32.5 Million

Background: Plaintiffs allege that the company, its senior officers and directors, as well as the underwriters for Talis’s initial public offering (“IPO”) violated Sections 11 and 15 of the Securities Act of 1933 by misrepresenting the effectiveness, regulatory status, and ability to manufacture the company’s “Talis One” COVID-19 test in the offering documents for the IPO.

BFA’s Role: BFA was appointed co-Lead Counsel for the putative class on June 3, 2022.

Status: BFA filed a second amended class action complaint on January 13, 2023. On April 28, 2023, Judge Susan Illston denied defendants’ motion to dismiss. Lead Plaintiff Martin Dugan’s motion for class certification was granted on February 9, 2024. On March 21, 2025, Judge Illston granted final approval of a \$32.5 million class settlement, stating during the approval hearing that the settlement was “excellent.”



Bilinsky v. Gatos Silver, Inc.

- District of Colorado, No. 22-CV-00453
- Client: Individual Investors
- Attorneys: Joseph A. Fonti, Evan A. Kubota, Benjamin F. Burry, Thayne Stoddard

**Total Settlement:
\$21 Million**

Background: Plaintiffs allege that Gatos and its senior management made materially false and misleading statements and concealed the fact that a key technical report for its Cerro Los Gatos silver mine located in Chihuahua, Mexico contained significant errors and overestimated the mineral reserves in the mine by as much as 50%. Plaintiffs pursue claims against the company and its executives under the Securities Exchange Act of 1934 and claims against the company, its executives, and directors under the Securities Act of 1933.

BFA's Role: BFA is sole Lead Counsel for the putative class.

Status: BFA filed an amended class action complaint on August 15, 2022. Following completion of motion to dismiss briefing and a fulsome mediation, BFA achieved a \$21 million class settlement. The proposed settlement represents an outstanding result given Gatos's serious financial constraints, the maximum theoretical damages, and the risks of continued litigation. On October 15, 2024, the Court granted final approval of the settlement.

Ciarciello v. Bioventus Inc.

- Middle District of North Carolina, No. 23-CV-32
- Client: Wayne County Employees' Retirement System
- Attorneys: Joseph A. Fonti, Javier Bleichmar, Evan A. Kubota, Nancy A. Kulesa, George Bauer, Benjamin Burry, Thayne Stoddard

**Total Settlement:
\$15.25 Million**

Background: Plaintiffs allege that in violation of Sections 10(b) and 20(a) of the Securities Exchange Act of 1934, from February 11, 2021 to March 30, 2023, defendants misrepresented and concealed: (1) deficiencies in Bioventus's internal controls over financial reporting and disclosure controls and procedures; (2) that Bioventus improperly accounted for rebates, in violation of Generally Accepted Accounting Principles, leading to materially inflated financial statements; and (3) that Bioventus had successfully offset the impact of a Medicare pricing shift on its key products.

BFA's Role: BFA is sole Lead Counsel representing Court-appointed Lead Plaintiff Wayne County Employees' Retirement System and the putative class.



Status: BFA filed an amended complaint on June 12, 2023, which Defendants moved to dismiss on July 17, 2023. In response, BFA filed a second amended complaint on July 31, 2023. On November 6, 2023, the Court denied defendants' motion to dismiss the Exchange Act claims.

On December 18, 2024, the Court granted final approval of the \$15.25 million class action settlement. The settlement represents a recovery of over 10.8% of the maximum estimated damages, and as much as 27% of potential triable damages. The recovery is more than double the 4.5–4.8% average recovery in Section 10(b) cases between 2014-2023.

In granting final approval, Judge Eagles noted that BFA's attorneys "are recognized nationally in the field of securities litigation" and that they "pursued the interests of the class zealously," specifically highlighting their efforts to ensure timely payment of the full settlement amount "when one of the defendants' insurers failed to pay settlement funds on time." The Court also commended BFA for "concentrat[ing] its efforts among a small number of attorneys to ensure work was done efficiently and without unnecessary duplication."

Colwell v. Exicure Inc.

- Northern District of Illinois, No. 21-CV-6637
- Client: Individual Investors
- Attorneys: Joseph A. Fonti, Evan A. Kubota

**Total Settlement:
\$5.625 Million**

Background: The amended complaint alleges that from January 7, 2021 to December 10, 2021, defendants misrepresented the results of Exicure's XCUR-FXN preclinical program for the treatment of Friedreich's ataxia ("FA") in public presentations and SEC filings, concealing serious improprieties committed by a senior researcher in the preclinical program. The initial complaint alleges violations of Sections 10(b) and 20(a) of the Securities Exchange Act of 1934.

BFA's Role: BFA was appointed as Lead Counsel for the putative class on March 20, 2023.

Status: The Court appointed BFA client James Mathew as Lead Plaintiff on March 20, 2023. BFA filed a second amended complaint on May 26, 2023. On September 6, 2024, BFA moved for preliminary approval of a \$5.625 million class settlement, representing over 22% of maximum estimated damages. The Court granted final approval on January 13, 2025.



Owen v. Elastos Foundation

- Southern District of New York, No. 19-CV-05462
- Client: Individual Investors
- Attorneys: Javier Bleichmar, George Bauer

**Total Settlement:
\$2 Million**

Background: Lead Plaintiffs allege that the Defendants offered and sold unregistered securities in the form of ELA Tokens, which the Defendants marketed as the “intrinsic token on the Elastos blockchain” that could “be used for trading, investing in digital assets, paying for blockchain processing fees and so on.” Defendants offered or sold the ELA Tokens in an initial coin offering (“ICO”) in January 2018, in the secondary market, and in a “Lock-In” program, whereby Elastos offered investors additional ELA Tokens in exchange for the investors agreeing not to sell their tokens for a predetermined length of time. Lead Plaintiffs allege violations of Sections 5, 12(a)(1), and 15 of the Securities Act of 1933, and the case raises complex and novel issues concerning the application of the Securities laws to digital assets.

BFA’s Role: BFA was appointed Lead Counsel for the putative class on May 26, 2020.

Status: After nearly four years of hard-fought litigation, the Parties reached a proposed settlement on behalf of ELA token investors. On August 23, 2023, the Court granted preliminary approval of the proposed class action settlement. On December 26, 2023, the Court granted final approval of the \$2 million settlement.

Albert Chow v. Enochian Biosciences Inc. et al

- Central District of California, No. 22-cv-01374
- Client: Individual Investors
- Attorneys: Joseph A. Fonti, George Bauer

**Case Status:
Settlement Pending**

Background: Plaintiffs allege that from January 17, 2018 through June 27, 2022, Enochian and its senior management misrepresented the qualifications of Serhat Gumrukcu, the Company’s founder and “Inventor.” Defendants repeatedly represented Gumrukcu as a medical doctor and world-class disease researcher to the public and based the Company’s entire business model on his purported HIV cure. In truth, Gumrukcu was not a doctor, not a medical researcher, and had a long history of fraudulent business dealings and criminal activity. Gumrukcu is currently imprisoned and awaiting trial on murder charges stemming from allegations that he paid a hitman to kill a former business associate to prevent the associate from derailing Gumrukcu’s work with Enochian.



BFA’s Role: The Court appointed BFA as Lead Counsel for the putative class on October 22, 2023.

Status: On June 28, 2024, the Court denied Enochian’s Motion to Dismiss in its entirety from the bench after oral argument from both parties. At the hearing, Judge Holcomb commended counsel for “excellent briefing [and] argument” and said he “wish[ed] all lawyers were as skilled and prepared as you are.” Following a full-day mediation session, and continued further negotiations, the parties accepted a mediator’s recommendation to settle the case. On August 20, 2024, the Court granted preliminary approval of the proposed class action settlement.

In re Citigroup Securities Litigation

- Southern District of New York, No. 20-CV-9132
- Client: Public Sector Pension Investment Board (“PSP”)
- Attorneys: Javier Bleichmar, Joseph A. Fonti, Benjamin F. Burry, Erin H. Woods, Thayne Stoddard

**Case Status:
Pending**

Background: Plaintiffs allege that Citigroup and its senior management misrepresented and concealed that the company’s internal controls and risk management systems suffered from serious and longstanding deficiencies that exposed the Company to massive regulatory penalties that will cost significantly more than \$1 billion to remediate.

BFA’s Role: BFA is sole Lead Counsel for Court-appointed Lead Plaintiff PSP.

Status: The Court appointed PSP as Lead Plaintiff and approved its choice of BFA as Lead Counsel on February 4, 2021. BFA filed an Amended Complaint on April 20, 2021. The Court granted defendants’ motion to dismiss on March 24, 2023. BFA filed a motion to amend the complaint and a proposed Amended Class Action Complaint on May 24, 2023.

Peters v. Twist Bioscience Corp.

- Northern District of California, No. 22-cv-08168
- Client: Policemen’s Annuity and Benefit Fund of Chicago
- Attorneys: Joseph A. Fonti, Nancy A. Kulesa, George Bauer, Benjamin Burry

**Case Status:
Pending**

Background: Plaintiffs allege that from December 13, 2019 through November 14, 2022, Twist and its senior management misrepresented that the company possessed innovative proprietary technology to produce synthetic DNA at a higher quality and lower cost than competitors, positioning Twist for significant future



growth. Plaintiffs further allege that defendants engaged in accounting improprieties to conceal the scheme.

BFA's Role: The Court appointed BFA as Lead Counsel to represent Lead Plaintiff Policemen's Annuity and Benefit Fund of Chicago on July 28, 2023.

Status: BFA filed an amended complaint on October 11, 2023. Defendants filed a motion to dismiss on December 6, 2023. On September 3, 2025, the Court denied in part Defendants' motion. The case is currently in discovery.

Nixon v. CVS Health Corporation

- Southern District of New York, No. 1:24-cv-05303
- Client: Southeastern Pennsylvania Transportation Authority and City of Miami Fire Fighters' and Police Officers' Retirement Trust
- Attorneys: Javier Bleichmar, Erin H. Woods, Evan Kubota, George Bauer

**Case Status:
Pending**

Background: This case arises from CVS's misrepresentations regarding its ability to control medical costs and health care utilization patterns in its Health Care Benefits segment. During the relevant period, the company represented that its "integrated health care model . . . lowers overall health care costs" and that its "Health Care Benefits segment is expected to continue to benefit from Medicare and Commercial membership growth." In truth, however, CVS concealed the impact that escalating medical cost trends and health care utilization patterns had on the company at the time.

BFA's Role: BFA was appointed as Co-Lead Counsel for the putative class on December 5, 2024.

Status: BFA filed the amended complaint on March 4, 2025. Defendants moved to dismiss the amended complaint on May 9, 2025, and the motion is pending.

Lucid Alternative Fund, LP v. Five9, Inc.

- Northern District of California, No. :24-cv-08725
- Client: Lucid Alternative Fund, LP
- Attorneys: Joseph A. Fonti, George N. Bauer, Benjamin F. Burry, William Green

**Case Status:
Pending**

Background: This case concerns Five9's misrepresentations regarding the purported strength of the company's net new business bookings and visibility into its installed customer base. During the relevant period, Five9 stated its "net new business" experienced "very strong bookings momentum," was "knocking down some of the largest enterprise brands," and was "strong irrespective of the macro"



environment. In truth, when these statements were made, Five9 was in the throes of a “challenging bookings quarter” due to constrained and scrutinized customer budgets and sales execution issues, forcing the company to cut its annual revenue guidance and take remedial action to address sales execution issues.

BFA’s Role: BFA was appointed Lead Counsel on March 18, 2025.

Status: BFA filed the amended complaint on May 30, 2025. Defendants moved to dismiss on July 29, 2025, and the motion is pending.

In re MF Global Holdings Ltd. Securities Litigation

- Southern District of New York, No. 11-cv-07866
- Client: Alberta Investment Management Corp. (“AIMCo”)
- Lead Attorneys: Javier Bleichmar, Dominic Auld

**Total Settlements:
\$234.3 Million**

Background: This litigation arose from MF Global’s dramatic bankruptcy in October 2011. Plaintiffs alleged that defendants misrepresented the company’s risk controls, liquidity position, and exposure to European sovereign debt, and failed to properly account for its deferred tax assets.

BFA’s Role: BFA represented Court-appointed Co-Lead Plaintiff AIMCo. Partners Javier Bleichmar and Dominic Auld represented AIMCo in this case since its inception in November 2011, and served as Court-appointed Co-Lead Counsel for the putative class since January 2012. When BFA launched in August 2014, the Court approved AIMCo’s selection of BFA to serve as Co-Lead Counsel for the putative class, continuing the core litigation team’s representation.

Status: Lead Counsel achieved five partial settlements valued at a total of just over \$234 million on behalf of investors: (1) a \$74 million settlement with Goldman Sachs and certain other underwriters of the company’s securities; (2) a \$64.5 million settlement with former officers and directors, including MF Global’s former CEO Jon Corzine; (3) a \$65 million settlement with auditor PricewaterhouseCoopers; (4) a \$29.825 million settlement with Jefferies and other underwriters of the final bond offering issued during the Class Period; and (5) a separate \$932,828 settlement with another underwriter defendant associated with that last offering. These settlements represent a recovery of as much as 35% of the estimated recoverable damages available at trial – an excellent result, particularly in light of the issuer’s bankruptcy.

These settlements were achieved after years of hard-fought litigation. Following the Court’s decision sustaining the Complaint and denying defendants’ six motions to dismiss in their entirety, Co-Lead Counsel reviewed millions of documents produced by defendants and third-parties, and conducted more than 50 depositions of former



employees of MF Global and other key witnesses, including four days of testimony from former CEO Jon Corzine. The Court granted Plaintiffs' motion for class certification on October 14, 2015, which assisted in achieving the settlements.

In re Genworth Financial Inc. Securities Litigation

- Eastern District of Virginia, No. 14-cv-00682
- Client: Alberta Investment Management Corp. ("AIMCo")
- Lead Attorney: Joseph A. Fonti

**Total Settlement:
\$219 Million**

Background: Plaintiffs alleged that defendants misrepresented the profitability of the company's core business and reported false financial results by grossly understating long-term care insurance reserves. When Genworth announced a \$531 million charge to its reserves, the company's stock price fell more than 55% - wiping out billions in market capitalization - and credit rating agencies downgraded the company and its corresponding debt to "junk" status.

BFA's Role: BFA represented Court-appointed Co-Lead Plaintiff AIMCo. In November 2014, the Court approved AIMCo's selection of BFA to serve as Co-Lead Counsel for the putative class.

Notably, BFA secured one of the most thoroughly reasoned, investor-oriented decisions after the then-recent decision in *Omnicare v. Laborers District Council Construction Industry Pension Fund*, 135 S. Ct. 1318 (2015). The District Court ruled that Lead Plaintiffs had sufficiently pled that defendants' statements were intended to mislead investors and to provide false assurances regarding the company's reserves. The District Court also largely sustained allegations that defendants falsely certified that the company's internal controls were adequate.

Status: On March 10, 2016, Genworth announced a proposed settlement of \$219 million, the largest securities class action recovery achieved in the Eastern District of Virginia, and as much as 44% of estimated recoverable damages available at trial. BFA and AIMCo sought and achieved a significant contribution from the company beyond available insurance; despite significant liquidity issues, the company paid \$69 million, and the remaining \$150 million was funded by insurance.

The settlement was reached after 15 months of intense and complex litigation. The Eastern District of Virginia is known as the "rocket docket" for its rapid disposition of cases and strict adherence to schedule deadlines. In December 2014, Lead Plaintiffs filed a consolidated complaint and, in February 2015, defendants filed a motion to dismiss. Partner Joseph A. Fonti successfully argued against the motion on April 28, 2015, and the securities fraud claims were sustained on May 1, 2015. Lead Plaintiffs filed their motion for class certification on December 3, 2015; fact discovery closed on January 15, 2016; and expert discovery closed on February 11,



2016. In effect, BFA conducted two to four years of litigation in just 15 months. This effort included more than 20 depositions, extensive trial preparation, and full briefing on motions for class certification and summary judgment. At the time of settlement, BFA attorneys were preparing for trial, which was scheduled to begin on May 9, 2016.

In re Weatherford International Securities Litigation

- Southern District of New York, No. 12-cv-02121
- Client: Anchorage Police and Fire Retirement System
- Lead Attorney: Javier Bleichmar

**Total Settlement:
\$120 Million**

Background: Plaintiffs alleged that Weatherford, one of the world's largest oil and gas servicing companies, issued false financial statements that misled investors about its tax structure and internal controls. The company allegedly overstated its earnings by more than \$900 million and was forced to issue three restatements due to its failure to comply with Generally Accepted Accounting Principles.

BFA's Role: BFA represented Court-appointed Co-Lead Plaintiff Anchorage Police and Fire Retirement System, and BFA partner Javier Bleichmar represented Anchorage continuously since the case was filed in March 2012.

Status: In June 2015, the company agreed to settle all claims for \$120 million of out-of-pocket cash, with no available insurance, or as much as 30% of recoverable damages available at trial. Achieving this settlement required more than three years of intense litigation, including defeating defendants' motion to dismiss in its entirety; obtaining class certification; completing fact discovery, after more than 20 depositions and the review of more than eight million pages of documents; filing four expert reports; and preparing for expert discovery and summary judgment.

In re Computer Sciences Corp. Securities Litigation

- Eastern District of Virginia, No. 11-cv-00610
- Client: Ontario Teachers' Pension Plan Board
- Lead Attorney: Joseph A. Fonti

**Total Settlement:
\$97.5 Million**

Background: Plaintiffs alleged that the company and two of its executive officers misrepresented (i) a multi-billion-dollar contract with the United Kingdom's National Health Service, and (ii) that the company's internal controls were adequate.

BFA Role: BFA partners Javier Bleichmar, Joseph A. Fonti, and Dominic Auld represented Court-appointed Lead Plaintiff Ontario Teachers' at all stages of this case. Upon the founding of the Firm, the Court approved Ontario Teachers' Pension Plan Board's selection of BFA as counsel, continuing the team's representation.



Status: On September 2013, the Court granted final approval to the \$97.5 million settlement. At that time, the settlement was the second largest all cash recovery achieved in the Eastern District of Virginia, and represented as much as 38% of recoverable damages at trial.

In re Celestica Inc. Securities Litigation

- Southern District of New York, No. 07-cv-00312
- Client: New Orleans Employees' Retirement System
- Lead Attorney: Joseph A. Fonti

**Total Settlement:
\$30 Million**

Background: Plaintiffs alleged false and misleading statements relating to a significant corporate restructuring plan, earnings, profitability, and financial outlook. When Celestica ultimately disclosed the truth, its stock price dropped 50%, reducing market capitalization by \$1.3 billion.

BFA's Role: BFA partners Joseph A. Fonti and Erin Woods represented Lead Plaintiffs in this litigation. Notably, Joseph was successful in arguing before the Court of Appeals for the Second Circuit, securing an investor-oriented interpretation of the pleading standard for scienter. Joseph also successfully argued in favor of plaintiffs' class certification and summary judgment motions before the District Court, securing the first lower court decision after *Halliburton Co. v. Erica P. John Fund, Inc.*, 134 S. Ct. 2398 (2014) in favor of investors on the issue of class-wide reliance.

Status: In April 2015, plaintiffs filed a motion for preliminary approval of a proposed \$30 million settlement resolving all claims against the company and officer defendants. The final approval hearing was held on July 28, 2015 and, later that day, the Court approved the \$30 million settlement.

* * *

BFA attorneys have also played key roles in some of the most significant investor protection litigation in recent history, helping shareholders recover significant losses caused by financial misconduct in various industries across the marketplace. Select cases include:

In re Broadcom Corp. Class Action Litigation, No. 06-cv-5036 (C.D. Cal.).

This class action against Broadcom was based on allegations that the company inflated its stock price by intentionally backdating its stock option grants for over five years. Ultimately, the company was forced to issue a \$2.2 billion restatement of its financial statements for the period spanning from 1998 through 2005, which became the largest restatement ever due to options backdating.



The company acknowledged the “substantial evidence” of backdating, and lead plaintiffs secured a \$173.5 million settlement, which, at the time, was the second largest cash settlement ever involving a company accused of options backdating. This was also the only such case in which claims against the auditors were sustained.

***In re HealthSouth Corp. Securities Litigation*, No. 03-cv-1501-S (N.D. Ala.).**

This case involved the largest securities fraud ever arising out of the healthcare industry, and ultimately resulted in a total settlement amount of \$804.5 million for the class. The class action involved claims against HealthSouth for falsifying its revenues and conducting a series of acquisition transactions in order to effectuate a massive fraud against the Medicare system.

False statements by the company and its officers led to the inflation of HealthSouth’s stock price, while at the same time company executives were amassing significant personal wealth by selling their own shares of HealthSouth stock.

Significantly, the litigation also resulted in the recovery of \$109 million from HealthSouth’s outside auditor Ernst & Young LLP, one of the largest recoveries to date against an auditing firm.

***In re Schering-Plough Corp. / ENHANCE Securities Litigation*, No. 08-397 (D.N.J.).**

Lead Plaintiffs brought litigation in the District of New Jersey against Schering-Plough Corporation and Merck/Schering-Plough Pharmaceuticals, and certain company officers, in *In re Schering-Plough Corp. / ENHANCE Securities Litigation*, alleging that they failed to disclose material information about the prospects of cholesterol-lowering drugs.

After nearly six years of litigation, defendants agreed to pay \$473 million to settle the matter on the eve of trial. This marked the largest securities class action recovery in history obtained from a pharmaceutical company. Together with a related securities class action against Merck, the *ENHANCE* litigation settled for \$688 million.



CORPORATE GOVERNANCE HIGHLIGHTS

The Police and Fire Retirement System of the City of Detroit v. Elon Musk, et al.

- Court of Chancery of the State of Delaware, No. 2020-0477
- Client: Police and Fire Retirement System of the City of Detroit
- Lead Attorneys: Javier Bleichmar, Joseph A. Fonti, George Bauer, Nancy A. Kulesa, Thayne Stoddard

Settled

Background: Plaintiffs allege that from 2017 to 2020, certain current and former members of Tesla’s Board of Directors (the “Director Defendants”) awarded themselves unfair and excessive compensation. This compensation was significantly above the compensation awarded to directors at Tesla’s peer companies. Through these awards, plaintiff alleges that the Director Defendants breached their fiduciary duties and unjustly enriched themselves at Tesla’s expense.

BFA’s Role: BFA is co-Counsel representing Plaintiff Police and Fire Retirement System of the City of Detroit.

Status: BFA filed a complaint on June 17, 2020. On September 17, 2020, the Director Defendants filed an answer to the complaint. Thereafter, the parties engaged in extensive discovery: Plaintiff served numerous written discovery requests on Defendants, served 23 third-party subpoenas, completed 22 fact witness depositions, and the parties exchanged opening and rebuttal expert reports. On July 14, 2023, the parties agreed to settle the action on terms that amount to the largest derivative settlement in the history of the Delaware Court of Chancery.

The settlement contemplates the following considerations:

- The Director Defendants will return to Tesla the value of over 3.1 million options, which, by using an agreed-upon valuation methodology, are valued at over \$735 million.
- Certain Director Defendants will permanently forgo compensation for 2021, 2022, and 2023.
- Tesla and its Board of Directors will implement certain governance reforms regarding director compensation effective for the next five years. These reforms include: (i) conducting an annual review and assessment of director compensation with the assistance of an independent compensation consultant; (ii) providing disclosures to Tesla stockholders regarding the



results of the annual review and assessment of director compensation, including any peer group or other comparative data; (iii) submitting proposed director compensation to an approval vote of the majority of Tesla stockholders who are unaffiliated with the Director Defendants and the other members of the current Tesla Board; and (iv) reviewing Tesla's internal controls specific to director compensation and implementing any changes necessary to ensure appropriate administration of director compensation.

The Court approved the settlement on January 8, 2025.

Ohio Public Employees Retirement System, State Teachers Retirement System of Ohio, and Oklahoma Firefighters Pension and Retirement System v. Calhoun et al. and The Boeing Company

- Eastern District of Virginia, No. 24-cv-01200; Court of Chancery of the State of Delaware, No. 2024-1210-MTZ
- Client: Ohio Public Employees Retirement System, State Teachers Retirement System of Ohio
- Lead Attorneys: Joseph A. Fonti, Javier Bleichmar, Lesley E. Weaver, Derrick Farrell, Matthew Miller, Evan A. Kubota

Case Status:
Pending

Background: Plaintiffs allege that certain of Boeing's current and former board members and senior management, including former CEO David Calhoun, made (or participated in making) public misstatements about Boeing's safety measures and legal compliance.

BFA's Role: BFA is Counsel for Plaintiffs Ohio Public Employees Retirement System and State Teachers Retirement System of Ohio.

Status: BFA represents Ohio Public Employees Retirement System and State Teachers Retirement System of Ohio in two derivative actions involving Boeing. The first action is pending in the Eastern District of Virginia. That action alleges that the Company's board and senior management made public misstatements regarding systemic safety and quality issues that impacted Boeing aircraft, leading to the January 2024 incident when a Boeing 737 MAX's door plug blew out at 16,000 feet, causing significant financial, regulatory, reputational, and legal harm to Boeing. On December 20, 2024, U.S. District Judge Leonie Brinkema denied Defendants' motion to dismiss as to claims under the Securities Exchange Act of 1934, finding that "plaintiffs have pled with particularity violations of Section 10(b) and 14(a)." On February 3, 2025, Judge Brinkema advanced the claims to



discovery. The parties have completed fact and expert discovery, and the action is currently stayed pending resolution of an appeal in a related case.

The second action is pending in the Delaware Court of Chancery. That action alleges that the Company’s board and senior management breached their fiduciary duties by failing to implement and oversee safety and compliance functions that led to systemic quality issues with Boeing aircraft. On March 20, 2025, Vice Chancellor Morgan T. Zurn appointed Ohio Public Employees Retirement System, State Teachers Retirement System of Ohio, and Oklahoma Firefighters Pension and Retirement System as Lead Plaintiffs and BFA as Co-Lead Counsel. On August 15, 2025, BFA filed an amended complaint.

In re Wells Fargo & Co. Consolidated Derivative Shareholder Litigation

- Northern District of California, No. 22-cv-05173
- Client: City of Plantation Police Officers’ Retirement Fund, City of Pontiac Reestablished General Employees’ Retirement System, and Amy J. Cook
- Lead Attorneys: Lesley Weaver, Derrick Farrell, Nancy Kulesa, Matthew Miller, Joshua Samra, Robert Lackey

Case Status:
Pending

Background: The Wells Fargo Derivative Action consolidates a series of cases brought on behalf of the shareholders of Wells Fargo & Company, alleging (among other things) that its Board of Directors breached their fiduciary duties with regards to Wells Fargo’s discriminatory hiring and lending practices.

BFA’s Role: BFA is Co-Lead Counsel representing Co-Lead Plaintiffs the City of Plantation Police Officers’ Retirement Fund, the City of Pontiac Reestablished General Employees’ Retirement System, and Amy J. Cook.

Status: BFA and other Co-Lead Counsel filed a consolidated amended complaint on May 10, 2024. Defendants’ moved to dismiss on June 11, 2024. On September 19, 2024, the Court denied in part defendants’ motion to dismiss, finding that the complaint adequately alleged that the Wells Fargo Board “Failed to Implement Reporting Systems and Controls as to the Mission Critical Issue of Fair Lending Compliance.” Judge Thompson further wrote that “[t]he Board had no committee charged with direct responsibility to monitor fair lending compliance,” it “did not monitor, discuss, or address fair lending compliance on a regular schedule,” and “had no regular process or protocols that required management to keep the Board apprised for fair lending compliance practices, risks, or reports.” What’s more, the Court stated that “[d]uring a key period, management received reports that contained what could be considered red, or at least yellow, flags [with respect to



fair lending compliance], and the Board minutes of the relevant period revealed no evidence that these were disclosed to the Board.”

The case is currently in discovery.

Anchorage Police & Fire Retirement System v. Adolf

- Delaware Court of Chancery, No. 2024-0354
- Client: Anchorage Police & Fire Retirement System
- Lead Attorneys: Javier Bleichmar, Derrick Farrell, Matthew Miller, Robert Lackey,

Case Status:
Pending

Background: On April 3, 2024, Bleichmar Fonti & Auld LLP and Grant & Eisenhofer P.A. filed suit in the Delaware Court of Chancery on behalf of the Anchorage Police & Fire Retirement System (together with the Teamsters Union No. 142 Pension Fund, represented by Labaton Keller Sucharow LLP and Andrews & Springer LLC), regarding breaches of fiduciary duty arising out of the August 31, 2023 buyout (the “Merger”) of Focus Financial, Inc. (“Focus”) by affiliates of Clayton, Dubilier & Rice, LLC (“CD&R”) and affiliates of Stone Point Capital LLC (“Stone Point”).

The Merger ascribed Focus with an enterprise value in excess of \$7 billion. The terms of the merger were negotiated by conflicted fiduciaries. The complaint identifies Rudy Adolf (Focus’ CEO), Rajini Kodialam (Focus’ COO), James D. Carey, Fayez S. Muhtadie, and Stone Point as steering the sale process toward CD&R for their own benefit. The complaint further alleges that other directors and officers of Focus breached their fiduciary duties regarding the sale as well. Count V of the Complaint alleges that Goldman Sachs aided and abetted the breaches of fiduciary duty.

BFA’s Role: BFA represents the Anchorage Police & Fire Retirement System in the action. In the oral arguments opposing Defendants’ motion to dismiss, BFA Partner Derrick Farrell delivered the argument on behalf of the Plaintiffs’ coalition.

Status: The complaint was made public on April 8, 2024. On December 5, 2024, BFA filed an opposition to Defendants’ motion to dismiss. On April 2, 2025, the Court denied, in part, Defendants’ motion to dismiss, converting the motion for counts against certain officers and directors of Focus into a motion for summary judgment. The Plaintiffs served written discovery on the Defendants, and discovery is currently underway for the as-converted motion for summary judgment.



CONSUMER LITIGATION HIGHLIGHTS

BFA Partner Lesley Weaver has been appointed to leadership positions in some of the most significant consumer actions of recent years, including: *In re Facebook, Inc. Consumer Privacy User Profile Litigation*, which has received preliminary approval of a \$725 million settlement; *In re Volkswagen “Clean Diesel” Marketing, Sales Practices, and Products Liability Litigation*, which resulted in settlements totaling greater than \$17 billion, the largest automotive settlement in history; *In re Chrysler-Dodge-Jeep EcoDiesel Marketing, Sales Practices and Products Liability*, which resulted in a settlement of \$307.5 million; and *In re Google RTB Consumer Privacy Litigation*, which is currently pending. These, and additional matters, are described below.

In re Facebook, Inc. Consumer Privacy User Profile Litigation

- MDL No. 2843
- Northern District of California, No. 3:18-md-02843

**Total Settlement:
\$725 Million**

Background: This high-profile case arising out of the Cambridge Analytica scandal, seeks redress for Facebook users in the U.S. whose private content was unlawfully shared with numerous third parties. The detailed consolidated complaint alleges that Facebook violated consumer fraud and privacy laws by disclosing Facebook users’ private information, without their knowledge or consent, to third parties, and that Facebook failed to take adequate steps to monitor third parties’ access to, and use of, that information in violation of Facebook’s terms of service.

BFA’s Role: Ms. Weaver serves as Co-Lead Counsel for Plaintiffs.

Status: On October 10, 2023, Judge Vince Chhabria issued an Order Granting Final Approval of the \$725 million class action settlement. This is the largest privacy settlement resolved through private litigation and the most Meta has ever paid to resolve such a case. On February 13, 2025, the U.S. Court of Appeals for the Ninth Circuit affirmed Judge Chhabria’s decision. The litigation is notable not only for the settlement amount, but for the many significant orders issued and the public evidence generated in the matter, which has been used by privacy advocates around the world. See *In re Facebook, Inc. Consumer Priv. User Profile Litig.*, 655 F. Supp. 3d 899 (N.D. Cal. 2023); *In re Facebook, Inc., Consumer Priv. User Profile Litig.*, 402 F. Supp. 3d 767 (N.D. Cal. 2019).



In re Volkswagen “Clean Diesel” Marketing, Sales Practices, and Products Liability Litigation

- MDL No. 2672
- Northern District of California, No. 3:15-md-02672

**Total Settlements:
\$17 Billion**

Background: This landmark case resolved claims against Volkswagen, Audi and Porsche in connection with the widely-reported news that the companies had installed emission systems created to avoid regulator detection and defraud customers who believed they were buying Volkswagen and Audi vehicles with “clean diesel” engines. VW admitted that it installed these “defeat devices,” which eliminated the emissions reduction during normal driving, and only allowed for reduced fuel emissions when the automobiles were being tested.

BFA’s Role: Judge Charles R. Breyer appointed Ms. Weaver to the Plaintiffs’ Steering Committee. Ms. Weaver’s leadership position in the case included spearheading the investigation that ultimately uncovered German auto supplier Robert Bosch GmbH’s significant role in multiple schemes to place software purposefully designed to evade emissions laws in vehicles. She also led the investigation into additional claims relating to defeat devices in certain gas vehicles, resulting in an additional \$96.5 million settlement for the Class.

Status: Lead Counsel and the Plaintiffs’ Steering Committee have achieved settlements for Plaintiffs worth more than \$17 billion, the largest automotive class action recovery in history.

In re Chrysler-Dodge-Jeep EcoDiesel Marketing, Sales Practices and Products Liability Litigation

- MDL No. 2777
- Northern District of California, No. 3:17-md-02777

**Total Settlements:
\$307.5 Million**

Background: This case resolved claims against Fiat Chrysler and Bosch over allegations that they deliberately cheated on emission testing of 2014-2016 model Dodge and Jeep trucks marketed and sold as environmentally friendly “eco-diesel” vehicles.

BFA’s Role: Judge Edward Chen of the U.S. District Court for the Northern District of California appointed Ms. Weaver as one of nine members of the Plaintiffs’ Steering Committee. Ms. Weaver played a key role in litigating the action, including taking depositions and coordinating with experts.

Result: The case has settled for \$307 million in cash in addition to extended warranties worth more than \$120 million.



In re Google RTB Consumer Privacy Litigation

**Case Status:
Settled**

- Northern District of California, No. 5:21-cv-02155

Background: The case is the first in the country to demand transparency about what information Google reveals about its users when it auctions ad placements to Google users through Google’s “Real-Time Bidding” system.

BFA’s Role: Ms. Weaver is a member of the Plaintiffs’ Executive Committee.

Status: On May 7, 2025, the parties notified the Court that they reached a settlement in principle to resolve the litigation on a class wide basis. On September 2, 2025, the parties filed the proposed settlement with the Court.

Calhoun, et al. v. Google LLC

**Case Status:
Pending**

- Northern District of California, No. 4:20-cv-05146

Background: This nationwide data privacy class action is brought on behalf of Google Chrome users alleging that Google violated its express promise not to take users’ personal data when using the Chrome browser outside of synched mode.

BFA’s Role: BFA is acting as co-lead counsel representing the class of Chrome users in this litigation.

Status: On August 20, 2024, the United States Court of Appeals for the Ninth Circuit ruled in favor of Plaintiffs, reversing a summary judgment in favor of Google, and sending the Chrome privacy case to trial.

In re: ZF-TRW Airbag Control Units Products Liability Litigation

**Case Status:
\$147,800,000 Million in Settlements; Remaining litigation pending**

- MDL No. 2905
- Central District of California, No. 2:19-MD-02905

Background: The class action complaint alleges the ZF-TRW airbag and seat belt control units in over 15 million cars sold are defective and may prevent airbags from inflating in the event of crash. This defect has been linked to at least eight deaths and several serious injuries.

BFA’s Role: Judge John A. Kronstadt of the Central District of California appointed Lesley Weaver to the Plaintiffs’ Steering Committee for this multidistrict litigation.

Status: On November 28, Judge Kronstadt granted final approval of the settlement for Toyota Class Members, with settlement benefits worth more than \$147.8 million. On October 10, 2023, plaintiffs announced a settlement with Defendants Mitsubishi Motors Corporation and Mitsubishi Motors North America, Inc. The remaining parties have briefed motions to dismiss, to stay discovery, and to compel arbitration.



Sydney Ji, et al. v. Naver Corp., et al.

- Northern District of California, No. 4:21-cv-05143

Case Status:
Pending

Background: The class action complaint alleges defendants surreptitiously collected personal information of users of the mobile messenger app, LINE Messenger, and photo altering app, B612.

BFA's Role: BFA is acting as co-lead counsel representing the class of users of the LINE Messenger and B612 apps.

Status: Plaintiffs filed their First Amended Class Action Complaint on October 28, 2022. On October 3, 2023, Judge Haywood S. Gilliam, Jr. largely denied defendants' motion to dismiss.



U.S. ANTITRUST LITIGATION HIGHLIGHTS

Lesley Weaver has been appointed to leadership positions and the BFA team plays key roles in many significant antitrust actions, including those described below.

In re Local TV Advertising Antitrust Litigation

- MDL No. 2867
- Northern District of Illinois, No. 1:18-cv-0678

Case Status:
\$48 Million in Settlements;
Remaining litigation pending

Background: Plaintiffs allege a price fixing cartel facilitated by an anticompetitive information exchange between and among certain major television station owners and operators to artificially inflate the prices of broadcast television spot advertisements.

BFA's Role: BFA acts as counsel for Plaintiff One Source Heating & Cooling, LLC and is an integral member of the litigation team.

Status: On November 6, 2020, Judge Virginia Kendall of the Eastern District of Illinois denied defendants' motion to dismiss. On December 7, 2023, Judge Kendall granted final approval of a \$48,000,000 settlement with Defendants CBS, Fox, The Cox Entities, and ShareBuilders. The action against the remaining defendants is ongoing.

In re Packaged Seafood Products Antitrust Litigation

- MDL No. 2670
- Southern District of California, No. 3:15-md-02670

Case Status:
Settlements Totaling Over \$39 Million Approved;
Remaining litigation and settlements pending

Background: Plaintiffs allege Defendants entered into a conspiracy involving packaged seafood products in violation of the Sherman Act and state antitrust law.

BFA's Role: BFA is part of a critical discovery effort against a key Defendant.

Status: On July 30, 2019, Judge Janis L. Sammartino of the Southern District of California granted class certification to a class of direct purchasers. In January 2021, Direct Purchaser Plaintiffs and Defendant Tri-Union Seafoods d/b/a Chicken of the Sea International and Thai Union Group PCL (collectively, "COSI"), announced a settlement agreement in principle, and final approval was granted in the amount of \$13,001,961.86 on March 7, 2023. On July 18, 2023, the Court granted final approval of a \$20 million settlement between End Payer Plaintiffs and Defendants COSI. On August 22, 2022, the Court granted final approval of a \$6,500,000 settlement



between Commercial Food Preparer Plaintiffs and Defendants COSI. Commercial Food Preparer Plaintiffs and Defendants StarKist Co. and Dongwon Industries Co., Ltd. reached a settlement on January 5, 2024. The remaining parties have briefed motions for summary judgment and are awaiting a decision.

In re Domestic Airlines Travel Antitrust Litigation

- District of Columbia, No. 1:15-mc-01404

Case Status:
\$60 Million in Settlements;
Remaining litigation pending

Background: Plaintiffs allege a conspiracy by the four largest commercial air passenger carriers in the United States—American Airlines, Inc., Delta Airlines, Inc., Southwest Airlines Co., and United Airlines, Inc.—to fix prices for domestic air passenger transportation services in violation of the Sherman Act by colluding to limit capacity on their respective airlines.

BFA's Role: BFA is a key part of plaintiffs' nonparty discovery committee and has led meet and confer negotiations with dozens of nonparties, resulting in the production of some of plaintiffs' best evidence.

Status: Plaintiffs settled for \$15 million with Defendant Southwest Airlines and \$45 million with Defendant American Airlines. On September 5, 2023, Judge Kollar-Kotelly denied in full Defendants Delta's and United's Motions for Summary Judgment, which sought dismissal of Class Plaintiffs' claims.

In re Mexican Government Bonds Antitrust

- Southern District of New York., No. 1:18-cv-02830

Case Status:
\$21 million in Settlements; Remaining litigation pending

Background: Plaintiffs allege that Defendant broker-dealers have fixed auctions for securities issued by the Mexican government and manipulated the bid-ask spread in transactions to U.S.-based investors, causing U.S.-based investors to pay artificially inflated prices for their Mexican government bonds.

BFA's Role: BFA represents Southeastern Pennsylvania Transit Authority and is assisting the team litigating the case in the Southern District of New York.

Status: Plaintiffs negotiated ice-breaker settlements with JPMorgan for \$15 million and Barclays PLC for \$5.7 million, and are cooperating in litigating against the remaining defendants, based on a highly detailed complaint based in part on incriminating documents received from the cooperating defendants. On February 9, 2024, the Second Circuit vacated the District Court's dismissal on jurisdictional



grounds, finding that the alleged price-fixing had enough connection to New York to maintain the case in the United States. The case is in discovery.

In re Disposable Contact Lens Antitrust Litigation

- MDL No. 2626
- Middle District of Florida, No. 3:15-md-02626

**Total Settlements:
\$118 million**

Background: This case resolved claims against four leading contact lens manufacturers and the largest nationwide distributor of contact lenses. Plaintiffs alleged that defendants unilaterally imposed minimum retail prices for contact lenses, in violation of state and federal antitrust laws.

BFA's Role: BFA led discovery efforts against the largest manufacturer-Defendant, Johnson & Johnson.

Status: Plaintiffs settled with Defendant CooperVision, Inc. for \$3 million, with Defendant Bausch & Lomb for \$10 million, with Defendant ABB Optical Group LLC for \$30.2 million, with Defendant Alcon Vision, LLC for \$20 million, and with Defendant Johnson & Johnson Vision Care, Inc. for \$55 million.

In re Farm-Raised Salmon and Salmon Products Litigation

- Southern District of Florida, No. 19-CV-21551

**Total Settlements:
\$85 Million**

Background: Plaintiffs alleged that defendants fixed prices of farm-raised Atlantic salmon sold in the United States.

Role: BFA worked with the executive team facilitating jurisdictional discovery.

Status: Plaintiffs achieved a \$85 million settlement.

In re Blood Plasma Antitrust Litigation

- MDL No. 2109
- Northern District of Illinois, No. 1:09-cv-07666

**Total Settlements:
\$128 Million**

Background: Plaintiffs alleged that defendants participated in a multi-year conspiracy to restrict output and fix prices of Ig and Albumin in the United States.

BFA's Role: Ms. Weaver played a significant role, including deposing the Chief Operating Officer and Chief Marketing Officer of one of the main defendants.

Result: Plaintiffs achieved a \$128 million settlement.



In re Lithium Ion Batteries Antitrust Litigation

- MDL No. 2420
- Northern District of California, No. 4:13-md-02420

**Total Settlements:
\$113 Million**

Background: Indirect Purchaser Plaintiffs alleged that the largest lithium ion battery producers unlawfully fixed the prices of lithium ion battery cells, affecting the prices indirect purchasers paid for lithium ion batteries and lithium ion products.

BFA's Role: BFA represented the cities of Palo Alto and Richmond, California.

Result: Indirect Purchaser Plaintiffs settled with defendants for \$113 million.



TEAM PROFILES

JAVIER BLEICHMAR
Partner

New York

- Email: jbleichmar@bfalaw.com
- Tel: +1 212 789 1341
- www.bfalaw.com/professionals/javier-bleichmar

Javier Bleichmar co-founded BFA and leads the firm’s U.S. Case Evaluation and U.S. Securities Litigation teams. He brings a decades-long career of litigation success to his prosecution of large-scale securities class and shareholder actions on behalf of institutional investors. Over the course of his career, Javier has secured significant recoveries for clients and the classes they represent, while achieving landmark and sweeping corporate governance improvements.

Javier has consistently been recognized as one of the nation’s leading plaintiffs’-side financial lawyers. He has been named a Titan of the Plaintiffs’ Bar by *Law360*, a SuperLawyer by Thomson Reuters, and a Leading Plaintiff Financial Lawyer by *Lawdragon*, and has been “recommended” in the field of securities litigation by the *Legal 500*. Most recently, Javier was profiled by *The New York Law Journal*, *Forbes*, *Fortune*, and *CT Insider* for his work achieving landmark outcomes.

Javier played a leading role in prosecuting the firm’s derivative stockholder action against Tesla’s Board of Directors in Delaware Court of Chancery, resulting in a historic resolution valued at \$919 million—the largest derivative settlement in Delaware history. He also spearheaded the securities class action against Teva Pharmaceutical Industries, Ltd., recovering \$420 million for investors.

Other significant resolutions include the \$234 million recovery in *In re MF Global Holdings Limited Securities Litigation* on behalf of BFA client Her Majesty the Queen in Right of Alberta in connection with MF Global’s collapse and bankruptcy, the \$129 million for investors in the securities class action against Granite Construction Inc. that involved the company’s restatement of financial results in 2020, and successfully representing the Metropolitan Transportation Authority in an action against Allianz Global Investors U.S., L.L.C. that centered on Allianz’s now-defunct Structured Alpha funds, which toppled one of Allianz’s U.S. subsidiaries.

Javier has co-authored several articles concerning developments in the securities class action, group action and investor protection landscapes in the U.S. and globally, and has been published by *The New York Law Journal*, as well as in newsletters for the National Association of Public Pension Attorneys, the National Council on Teacher Retirement, and the National Conference on Public Employee Retirement Systems, among others.



Javier is a native Spanish speaker and fluent in French.

Javier earned a B.A. from the University of Pennsylvania and a J.D. from Columbia University School of Law (1998), where he was a Harlan Fiske Stone Scholar. During law school, he served as a law clerk to the Honorable Denny Chin, U.S. District Court Judge for the Southern District of New York. Javier is a native Spanish speaker and fluent in French. Javier is admitted to practice in New York (1999), the U.S. Supreme Court (2014), and the U.S. Courts of Appeals for the Second Circuit (2010), Eighth Circuit (2010), Ninth Circuit (2010), Eleventh Circuit (2011), Tenth Circuit (2013), and Third Circuit (2021). He also is admitted in the U.S. District Courts for the Southern and Eastern Districts of New York (1999).

JOSEPH A. FONTI
Partner

New York

- Email: jfonti@bfalaw.com
- Tel: +1 212 789 1342
- www.bfalaw.com/professionals/joseph-fonti

Joseph A. Fonti co-founded BFA and leads the firm's U.S. Securities Litigation practice. With over two decades of experience representing institutional investors in complex litigation, Joseph's commitment to clients, dedication to his cases, and advocacy skills have led to exceptional results in several of the most prominent securities and derivatives cases in recent decades. Joseph has achieved significant recoveries for investors while also securing landmark and sweeping corporate governance improvements.

Joseph has consistently been recognized as one of the nation's leading plaintiffs'-side financial lawyers. He has been named a Titan of the Plaintiffs' Bar by *Law360*, a SuperLawyer by Thomson Reuters, and a Leading Plaintiff Financial Lawyer by *Lawdragon* and has been "recommended" in the field of securities litigation by *Legal 500*. He has also been recognized by Chambers USA for his securities litigation prowess, with clients quoted in Chambers praising him as "a vigorous, strong litigator who does everything he can to represent his clients." Joseph has been profiled by *The New York Law Journal*, *Forbes*, *Fortune*, and *CT Insider*, among others, for the landmark results he achieved for investors.

Joseph led the team that prosecuted the firm's derivative stockholder action against Tesla's Board of Directors in Delaware Chancery Court, resulting in a historic resolution valued at \$919 million—the largest derivative settlement in Delaware history. He also led BFA's prosecution of the securities class action against Teva Pharmaceutical Industries, Ltd. arising from misrepresentations concerning price fixing and other unlawful conduct. After five years of hard-fought litigation, including securing class certification, extensive fact and expert discovery, and preparing a summary judgment motion, BFA secured a \$420 million recovery for shareholders.



Throughout his career, Joseph has led historic litigations representing U.S. institutional investors and a number of Canada's most significant pension systems and asset managers. He served as co-lead counsel in the \$219 million recovery on behalf of shareholders of long-term care insurer Genworth Financial, the largest securities class action settlement in the history of the Eastern District of Virginia. Joseph also served as sole Lead Counsel in the securities class action involving Computer Science Corporation, recovering \$97.5 million for the class at the brink of trial. In addition, he helped lead the prosecution and ultimate resolution of the *Weatherford* securities litigation, achieving a \$120 million recovery for Weatherford shareholders; and contributed to securing a \$173.5 million settlement in *In re Broadcom Corp. Securities Litigation*, which, at the time, was the second-largest cash settlement involving a company accused of options backdating.

Joseph has also achieved significant successes for clients in the area of auditor liability. He represented shareholders in the \$671 million recovery in *In re HealthSouth Securities Litigation*, recovering \$109 million from HealthSouth's outside auditor Ernst & Young LLP, one of the largest recoveries to date against an auditing firm.

Currently, Joseph is leading BFA's actions against TD Bank, Five9, Boeing, CVS, and Citigroup. Joseph also led the teams prosecuting actions against Bioventus (\$15.25 million settlement) and Gatos Mining (\$21 million settlement).

In addition to his success in trial and settlement, Joseph has distinguished himself as an appellate advocate. For example, he successfully argued before the Second Circuit Court of Appeals in *In re Celestica Inc. Securities Litigation* and was instrumental in advocacy before the Ninth Circuit Court of Appeals in *In re Broadcom Corp. Securities Litigation*.

Dedicated to community service, Joseph served for four years as Chair of the Leadership Committee for the Cardinal's Annual Stewardship Appeal for the Archdiocese of New York, which supports local communities across ten New York counties. He currently serves as a member of the board of Saint Joseph's Seminary of the Archdiocese of New York and as a trustee of Saint Augustine Parish in Larchmont, New York.

Joseph earned a B.A., *cum laude*, from New York University and a J.D. from New York University School of Law (1999), where he was a member of the Marden Moot Court. He is admitted to practice in New York (2000), the U.S. Supreme Court (2007), and the U.S. Courts of Appeals for the Second Circuit (2010), Ninth Circuit (2007), and Tenth Circuit (2013). He also is admitted in the U.S. District Courts for the Southern and Eastern Districts of New York (2001).



DOMINIC J. AULD
Partner

Toronto

- Email: dauld@bfalaw.com
- Tel: +1 212 789 1344
- www.bfalaw.com/professionals/dominic-auld

Dominic J. Auld co-founded BFA in 2014 and has nearly two decades of experience in representing and advising institutional clients in large-scale securities and investment-related lawsuits.

Dominic is responsible for BFA's outreach to pension systems, asset managers, and sovereign wealth funds outside the United States, regularly advising clients in Europe, Australia, Asia, and across his home country of Canada.

Dominic and his team have served as liaison counsel to global investors in dozens of shareholder and investor litigations outside the United States. With extensive experience working directly with institutional clients impacted by securities fraud, Dominic played a key role in representing the Ontario Teachers' Pension Plan Board in major securities actions, including *In re Nortel Networks Corp. Securities Litigation*, *In re Williams Securities Litigation*, and *In re Biovail Corp. Securities Litigation*—cases that collectively recovered over \$1.7 billion for investors.

Dominic is sought after as a high-profile commentator on topics such as corporate governance, shareholder activism, fiduciary duty, corporate misconduct, and international class and collective litigation. He has been a regular speaker and panelist at law and investment conferences, including past events such as the Canadian Foundation for Advancement of Investor Rights (FAIR Canada) and Osgoode Hall Law School conference on public and private securities enforcement and investor recovery in Toronto, the IMF Bentham shareholder class action conference in Sydney, and the Annual International Bar Association meeting in Dubai.

Dominic is the author of various articles of interest to the firm's client base, including an analysis of shareholder remedies in Japan in *Law360*, and a piece regarding custodian bank fees and their impact on pension funds globally in *Investment & Pensions Europe Magazine's Nordic Regions Pensions* and *Investment News* section. He is quoted in publications including *The Economist*, *The Financial Times*, *The New York Times*, *USA Today*, and *The Times of London*, among others, and numerous trade publications such as *Global Pensions*, *OP Risk and Regulation*, *The Lawyer*, *Professional Pensions*, and *Benefits Canada*. He also was interviewed by *Corporate Counsel* for a feature article on rogue trading.

Prior to founding BFA, Dominic was a partner at another securities litigation firm, and was previously a member of the team responsible for prosecuting the landmark action *In re WorldCom Inc. Securities Litigation*, which resulted in a settlement of more than \$6 billion.



Dominic has been named a “Super Lawyer” by Thomson Reuters in the field of securities litigation and has been “recommended” in the field of securities litigation by *Legal 500*.

Dominic earned a B.A. from Queen’s University in Canada and a J.D. from Lewis and Clark Law School (1998). He is admitted to practice in New York (1998), and in the U.S. District Courts for the Southern and Eastern Districts of New York (2011).

LESLEY E. WEAVER
Partner

Oakland

- Email: lweaver@bfalaw.com
- Tel: +1 415 445 4004
- www.bfalaw.com/professionals/lesley-weaver

Lesley E. Weaver is the Partner-in-Charge of the California office of BFA and head of its Consumer, Privacy & Antitrust Litigation practice. Lesley is an experienced, soup-to-nuts litigator who has deep experience with the legal and technical issues central to this action. Among the notable examples of her work are the following. As one of two Co-Lead Counsel appointed by Judge Vince Chhabria in the Northern District of California to lead the high-profile MDL against Facebook arising out of the Cambridge Analytica scandal, Lesley and her team steered the case to a \$725 million settlement after five years of tenacious litigation, yielding at least two landmark decisions of national import. *See In re Facebook, Inc. Consumer Priv. User Profile Litig.*, 655 F. Supp. 3d 899 (N.D. Cal. 2023); *In re Facebook, Inc., Consumer Priv. User Profile Litig.*, 402 F. Supp. 3d 767 (N.D. Cal. 2019). This is the largest amount paid in any private privacy class action to date. The 2024 Ninth Circuit decision in *Calhoun v. Google*, in which she is co-lead counsel, resolves critical issues on disclosure and consent in privacy actions. Lesley also played a central role in *In re Google RTB Consumer Privacy Litigation*, in which a settlement was recently noticed after four years of hard fought litigation. And in 2015, Lesley tried to verdict one of just two privacy actions to go to trial in the U.S., delivering opening and closing statements in a case that won 100% economic damages and fifteen times punitive damages.

In addition to landmark privacy cases, Lesley has played key roles in other significant matters. She was appointed by Judge Breyer of the Northern District of California to the Steering Committee in the *In re Volkswagen “Clean Diesel”* matter. That matter ultimately recovered more than \$17 billion for consumers and the environment. Lesley has served or is serving on executive committees of other significant privacy and automotive litigation, including *In re Chrysler-Dodge-Jeep EcoDiesel Marketing, Sales Practices and Products Liability Litig.*, which resulted in a settlement of \$307.5 million; and *In re ZF-TRW Airbag Control Units Products Liability Litig.*, which has resulted in settlements of \$147.8 million to date.



Lesley also has extensive experience in representing sophisticated institutional investors in landmark securities and derivative matters. She is licensed in Delaware and is part of the team litigating claims against the Boeing board for their breach of fiduciary duties. She is also lead counsel in a derivative action against Wells Fargo based on the bank's systemic discrimination in lending and hiring. Some of the landmark securities cases in which she has been involved include: *In re Marsh & McLennan Cos., Inc. Securities Litigation* (\$400 million settlement); *In re Cavanaugh Securities Litigation* (including an appeal to the Ninth Circuit concerning the method of selecting lead plaintiff and lead counsel after the enactment of the Private Securities Litigation Reform Act); *In re Cardinal Health Inc. Securities Litigation* (\$600 million settlement); and *In re Cisco Systems, Inc. Securities Litigation* (\$99 million settlement). Lesley also served as liaison counsel in *In re Twitter Secs. Litigation*, which resolved for \$805 million in 2022.

Lesley is also actively involved in various antitrust matters, including *In re Local TV Advertising Antitrust Litigation*, which seeks redress against providers of local television advertising who shared pricing information with each other to artificially increase prices for small business.

Lesley has received numerous awards throughout her career. She was named by *The National Law Journal* as one of just ten "Elite Women in the Plaintiffs' Bar" nationally in 2023; one of the "Top 500 Leading Plaintiff Consumer Lawyers" as well as "Leading Plaintiff Financial Lawyers" by *Lawdragon*; one of the "Top 100 Plaintiffs Lawyers" by the National Trial Lawyers for many years running; and the prestigious recognition as "California Attorney of the Year" in 2018 by the *Daily Journal*. She holds a Tier 1 *Chambers USA* ranking; was inducted into the Fellows of the American Bar Association in 2017; and has been ranked by Thomson Reuters as a "SuperLawyer" since 2016.

More important than external recognition is Lesley's sincere commitment to her cases and the profession. She has served as a Lawyer Representative for the Northern District of California, and co-chaired many boards of non-profit organizations. She recently served as Chair of the Executive Committee of the Securities Section for the Bar Association of San Francisco, as well as Chair of BASF's cybersecurity and privacy committee. She has been a repeat presenter at the Bolch Institute's MDL Certificate training program, and is one of the original drafters of the Duke MDL Diversity Guidelines. Lesley is frequently asked to speak by organizations around the country, and has been honored to serve as a panelist at multiple seminars by the Practising Law Institute, the California Lawyers Association, the Bar Association of San Francisco, the Golden State Institute, Class of Our Own, Women En Masse, California ABOTA, and many others. She is a past Co-Chair of Bay Area Lawyers for Individual Freedom, a past Co-Chair of the San Francisco LGBT Community Center, past National Chair of the National Center for



Lesbian Rights, and past Vice-President and Director of the Board of the Frameline Film Festival. She has served on the advisory board for the Lawyers Committee for Civil Rights, the board of the International Gay and Lesbian Human Rights Commission (now OutRight), and volunteers for Rotary, having been a Rotary exchange student herself.

Lesley speaks German and Danish, and is proficient in French.

Lesley studied at the University of Bonn (Germany) and Harvard College (A.B.), and received a J.D. from the University of Virginia Law School (1997).

Lesley is admitted to practice in California (1997), the U.S. Court of Appeals for the Ninth Circuit (1998), Delaware (2008), and the U.S. District Courts for the Northern District (1997) and the Eastern, Central, and Southern Districts of California (1998), and the Eastern District of Michigan (2019).

<p>NANCY A. KULESA <i>Partner</i></p>	<p>New York</p>	<ul style="list-style-type: none"> • Email: nkulesa@bfalaw.com • Tel: +1 860 869 5525 • www.bfalaw.com/professionals/nancy-kulesa
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Nancy Kulesa is a Partner at BFA, and has secured significant recoveries for institutional investors in securities class actions and shareholder actions while achieving historic corporate governance reforms. She has extensive experience in complex litigation in federal and state courts, including securities litigation, corporate governance, Employee Retirement Income Security Act of 1974 (ERISA) litigation, consumer fraud litigation, mergers and acquisitions cases, and antitrust litigation.

Nancy represents public pension funds, Taft-Hartley funds, and other institutional investors in securities class actions and derivative litigation, and consults with institutional investors to help them monitor litigation and to evaluate opportunities for recovery. She has over two decades of experience assisting clients in identifying material losses in their securities portfolios caused by corporate wrongdoing, and has repeatedly been recognized by Lawdragon as a Leading Plaintiff Financial Lawyer.

Nancy was a member of the team that prosecuted the firm’s derivative stockholder action against Tesla’s Board of Directors on behalf of the Police & Fire Retirement System of City of Detroit in the Delaware Court of Chancery, resulting in a historic resolution valued at \$919 million—the largest derivative settlement in Delaware history. Nancy is currently on the teams litigating BFA’s securities cases against Twist Bioscience, and Boeing. She was a member of the team that prosecuted the securities action against Allianz Global Investors U.S., L.L.C and Bioventus, Inc. She is also pursuing confidential derivative actions on behalf of additional institutional clients.



Prior to joining BFA, Nancy was a partner at a well-established national securities litigation firm, where she created and directed the firm's Portfolio Monitoring Services practice. Nancy has also been counsel in numerous high-profile securities fraud litigations which have recovered hundreds of millions of dollars for shareholders, including: *In re CIT Group Securities Litigation*, (\$75 million settlement) and *Carlson v. Xerox Corporation*, (\$750 million settlement). Nancy also represented a Taft-Hartley Fund in the historic settlement with Twenty-First Century Fox, Inc. regarding allegations of workplace harassment incidents at Fox News, which resulted in a \$90 million derivative settlement and wide-ranging corporate governance reforms at the company.

Nancy recently co-authored "Maximizing Returns Through Asset Protection and Recovery" and "The Importance of Private Enforcement of Federal Securities Laws: Institutional Investors Continue to Outpace SEC" in NCPERS' *PERSist* journal. She frequently speaks on topics related to securities litigation and investor rights at educational forums for public pension funds and Taft-Hartley funds.

Nancy earned a B.A. from Fordham University and a J.D. from the University of Connecticut School of Law (2001). She is a member of the National Conference on Public Employee Retirement Systems (NCPERS), International Foundation of Employee Benefit Plans (IFEBC), and many other organizations. She also serves as Treasurer of the National Association of Shareholder & Consumer Attorneys (NASCA). Nancy is admitted to practice in Connecticut (2001), the U.S. Court of Appeals for the Ninth Circuit (2016), and the U.S. District Courts for the District of Connecticut (2004) and the Southern District of New York (2015).

ERIN H. WOODS
Partner

New York

- Email: ewoods@bfalaw.com
- Tel: +1 212 789 1353
- www.bfalaw.com/professionals/erin-woods

Erin Woods is Director of Institutional Investor Relations at BFA and the head of the firm's Claims Filing Team. Erin's practice combines her vast experience advising institutional investors on current and potential securities litigation, as well as in recovering investment losses through filing settlement claims.

With nearly 20 years in the class action industry, Erin brings to BFA's clients a unique blend of years of litigation experience, over a decade of representation of institutional investors, and expertise in the claims administration process. She is currently a member of the teams prosecuting the securities class action against CVS, Inc. and Citigroup, Inc., as well as the teams pursuing Section 220 Demands on behalf of a number of BFA's clients. Erin also leads institutional investor outreach and advises pension funds and other entities on lawsuits concerning violations of



U.S. and non-U.S. securities and investment laws, antitrust and consumer laws, and relevant securities class action settlements.

Erin is regularly asked to speak about securities monitoring and litigation by numerous organizations, including on the inaugural panels at the annual conference of National Council on Teacher Retirement (NCTR), the annual conference for National Institute on Retirement Security, as well as annual conferences for the Louisiana Trustee Education Council (LATEC), among others.

Erin recently published “The Importance of Private Enforcement of Federal Securities Laws: Institutional Investors Continue to Outpace SEC” in *NCPERS PERSist*, “Examining Potential Conflicts of Interest in the Private Equity Industry During an Uncertain Market” and “The Australian Securities Class Action Landscape and Potential Changes Ahead” in the National Association of Public Pension Attorneys’ *NAPPA Report*, “Why an Active Approach to Corporate Governance is Important in Today’s Market” in *NCPERS Spring 2024 PERSist* and in the *Second Quarter Newsletter* by Georgia Association of Public Pension Trustees, and both “Claims Filing in Australia: Missed Recovery Opportunities for American Investors” and “Maximizing Returns Through Asset Protection and Recovery” in *NCPERS PERSist*.

While working with BFA’s founding partners as an associate at their prior firm, Erin litigated a number of securities class actions, including a matter that resulted in a cross-border settlement that was at the time the largest settlement under Canada’s securities class action laws, as well as two related cases that resulted in a \$100 million settlement.

Prior to joining BFA, Erin was a Director at an industry-leading claims administration firm, where she provided plaintiffs’ and defense counsel with comprehensive, accurate, and practical approaches to class action and mass tort settlement administration.

Erin earned a B.A. from Villanova University in 2004 and a J.D. from Brooklyn Law School in 2008. She is admitted to practice in New York (2009), the U.S. Courts of Appeals for the Ninth Circuit (2010) and Second Circuit (2011), and the U.S. District Court for the Southern District of New York (2009).

DERRICK FARRELL
Partner

Delaware

- Email: dfarrell@bfalaw.com
- Tel: +1 302 499 2158
- www.bfalaw.com/professionals/derrick-farrell

Derrick Farrell is a partner at BFA and leads the firm’s Corporate Governance Litigation group. He focuses his practice on representing stockholders in direct and derivative breach of fiduciary duty class action litigation. Derrick joined BFA with the launch of the firm’s Delaware office, where he has continued to expand BFA’s



growing Delaware practice. Derrick has substantial trial experience arguing before the Delaware Court of Chancery and conducting stockholder investigations under 8 *Del. C. § 220*.

Derrick is currently litigating derivative and fiduciary duty actions against the Boards of Directors of The Boeing Company, Wells Fargo, Inc., Focus Financial, Inc., and BioVentrix, Inc., as well as a Section 220 matter investigating Globe Life Inc., in addition to conducting a number of confidential investigations. He previously litigated a Section 220 matter investigating The Boeing Company.

Derrick also played a key role representing the lead plaintiff in *In re: Dell Technologies Inc. Class V Stockholders Litigation*, which challenged the acquisition of Dell's Class V tracking stock by Dell's controllers. The case settled for \$1 billion, which is the largest settlement in U.S. state court history. Other successful results include *In re Pattern Energy Group Inc. Stockholder Litigation*, a direct action successfully challenging a \$6.1 billion merger transaction which settled for \$100 million; and *Nantahala Capital Partners L.P. v. QAD Inc. et al.*, a direct action which succeeded in enjoining a merger on the basis of inadequate disclosures which settled for \$65 million.

Derrick served as one of the lead trial attorneys representing the lead plaintiff in *In re Sears Hometown and Outlet Stores, Inc. Stockholder Litigation*, which challenged the acquisition of Sears Hometown & Outlet Stores by its controlling stockholder for \$3.25 per share. After trial, the Court ultimately ruled in favor of the class and ordered damages of \$0.85 per share, representing a 26% premium to the original merger price. The parties are currently in the process of settling the matter to avoid a potential appeal.

Derrick has tried a number of other cases in the Delaware Court of Chancery, including *In re Appraisal of Ancestry.com, Inc.*, *IQ Holdings, Inc. v. Am. Commercial Lines Inc.*, and *In re Cogent, Inc. Shareholder Litigation*. He has also argued before the Delaware Supreme Court on multiple occasions.

Derrick began his career as a Clerk for the Honorable Donald F. Parsons, Jr., then a Vice Chancellor in the Delaware Court of Chancery. Thereafter, he gained substantial M&A experience as a defense lawyer at a prominent global law firm. Derrick has guest lectured at Harvard University and co-authored numerous articles for various publications, including the *Harvard Law School Forum on Corporate Governance and Financial Regulation* and the *Practicing Law Institute* (PLI).



ANNE K. DAVIS
Partner

Oakland

- Email: adavis@bfalaw.com
- Tel: +1 415 445 4016
- www.bfalaw.com/professionals/anne-davis

Anne has nearly 15 years of experience litigating complex matters in both federal and state courts, including in California, Delaware, and Kansas. She focuses her practice on complex investigations and litigation of antitrust, consumer, and securities matters.

She was a key member of the team that litigated *In re: Facebook, Inc. Consumer Privacy User Profile Litigation*, which resulted in a historic \$725 million settlement—the largest privacy class action settlement in history. She is currently a key member of the teams litigating *In re Google RTB Consumer Privacy Litigation*, *In re Google Generative AI Copyright Litigation*, *In re: Allstate & Arity Consumer Privacy Litigation*, *In re Local TV Advertising Antitrust Litigation*, *In re Domestic Airlines Travel Antitrust Litigation*, *In re: ZF-TRW Airbag Control Units Products Liability Litigation*, and *In re Mexican Government Bonds Antitrust Litigation*.

She was named a 2025 Lawdragon 500 Leading Plaintiff Consumer Lawyers, and a National Trial Lawyers Top 100 Litigator in 2023 and 2024. She serves on the Executive Committee of the California Lawyer’s Association’s Antitrust and Unfair Competition Law Section, am a Senior Editor of the California Antitrust and Unfair Competition Law Treatise, am an active member of and contributor to WG11 (Data Security and Privacy Liability) and WG13 (AI and the Law) for the Sedona Conference, and serve on the drafting team for the Sedona Conference Data Privacy Primer, Second Edition. She is also a member of the faculty for PLI’s annual Accounting for Lawyers seminar.

Prior to joining BFA, she served as a Principal Counsel for Sales Practice Enforcement at the Financial Industry Regulatory Authority (FINRA), where she investigated and litigated matters pertaining to violations of FINRA, U.S. Securities and Exchange Commission (SEC), Municipal Securities Rulemaking Board (MSRB) rules, and federal securities laws by registered individuals and FINRA member firms.

Before FINRA, she was a senior associate at a global law firm, where she specialized in securities litigation and enforcement, complex civil litigation, and internal investigations.

Anne earned a B.A. with honors from DePaul University (2002), a M.A. (Political Science) from the University of Michigan (2006), and a J.D. from the University of Michigan Law School (2008). She is admitted to practice in California (2009), the U.S. Court of Appeals for the Ninth Circuit (2023), and the U.S. District Courts for



the Northern (2010), Central (2011), Eastern (2014), and Southern (2025) Districts of California and the Eastern District of Michigan (2019).

EVAN KUBOTA
Partner

New York

- Email: ekubota@bfalaw.com
- Tel: +1 212 789 1347
- www.bfalaw.com/professionals/evan-kubota

Evan Kubota is a partner at BFA, with substantial experience in all stages of securities litigation through trial and appeal. Since joining BFA in 2019, Evan has participated in recovering over \$640 million for investors, including *In re Talis Biomedical Securities Litigation*, a class action arising from a failed COVID-19 test that recently settled for up to 72% of realistically recoverable damages, which the Court praised as an “excellent” result. Evan brings technical expertise and strategic insight informed by 15 years of experience litigating complex securities and derivative actions, bankruptcy confirmation and adversary proceedings, and regulatory investigations. He has worked closely with leading experts, presented at mediations and hearings, and participated in several trials.

Evan was a member of the teams prosecuting the successfully resolved cases against Teva Pharmaceutical Industries, Ltd., Granite Construction Incorporated, and Gatos Silver, Inc. He is currently litigating derivative actions against directors and officers of The Boeing Company and class actions against ICON plc and CVS Health.

Prior to joining BFA, Evan practiced at a large global law firm for nine years, where he litigated high-profile matters on behalf of financial institutions and issuers in a variety of industries: serving as plaintiff’s counsel in breach of contract, fraud and civil RICO litigations against a distressed insurance company; debtor’s counsel in a leading media company’s Chapter 11 bankruptcy, which eliminated over \$1 billion in debt; and defending numerous RMBS-related litigations, arbitrations, and investigations in the wake of the financial crisis.

Evan earned a B.A. from the University of Florida, *cum laude*, in 2007 and a J.D. from Harvard Law School, *cum laude*, in 2010. He is admitted to practice in New York (2011), the U.S. District Courts for the Southern and Eastern Districts of New York (2011) and the District of Colorado (2022), and the U.S. Court of Appeals for the Second Circuit (2021).

ROSS SHIKOWITZ
Partner

New York

- Email: rshikowitz@bfalaw.com
- Tel: +1 212 789 1349
- www.bfalaw.com/professionals/ross-shikowitz

Ross Shikowitz is a Partner at BFA, and focuses his practice on investigating, analyzing and prosecuting complex securities matters on behalf of institutional



investors. For over a decade, Ross has been advising many of the world's largest and most sophisticated institutional investors concerning their rights and potential legal claims arising out of securities-related matters. He is a leader of the firm's client monitoring and case evaluation group, in which he, together with a team of attorneys and financial analysts, develops and recommends legal strategies to the firm's clients.

Ross was one of the lead litigators for the securities class action against Granite Construction Incorporated, which achieved a \$129 million resolution on behalf of the class. Ross also plays a key role representing investors in the securities class actions concerning Talis Biomedical Corp. (\$32.5 million resolution), Gatos Silver, Inc. (\$21 million resolution), Bioventus Inc. (\$15.25 million resolution), The Toronto-Dominion Bank, CVS Health Corporation, and Five9, Inc.

Ross has consistently been named as a "Rising Star" and a member of "Super Lawyers" in the area of securities litigation by Thomson Reuters *Super Lawyers*. He was also recognized by *Legal 500* for his work representing investors.

Ross serves as a Vice President of the Institute for Law and Economic Policy, a public policy research and educational foundation focused on preserving, studying, and enhancing investor and consumer access to the civil justice system. He previously served as a member of *Law 360* Securities Editorial Advisory Board, providing the organization with expert insight into relevant trends in securities litigation. Ross has authored several articles focused on investor protection that have been published by the Harvard Law School Forum on Corporate Governance, National Association of Public Pension Attorneys and the National Conference on Public Employee Retirement Systems, among others.

Prior to joining the firm, Ross successfully represented numerous institutions that were misled when investing in residential mortgage-backed securities, and participated in the resolution of securities class actions concerning a European car manufacturer as well as a U.S. technology company.

Ross is admitted in New York (2011), and the U.S. District Court for the Southern District of New York (2012), the Eastern District of New York (2012), and the District of Colorado (2022).

GEORGE BAUER
Partner

New York

- Email: gbauer@bfalaw.com
- www.bfalaw.com/professionals/george-bauer

George Bauer is a partner at BFA and represents institutional investors in complex securities and investment-related disputes.



George was a lead member of the team that litigated and resolved the firm's derivative stockholder action against Tesla and its Board of Directors in Delaware Court of Chancery, which resulted in the largest derivative settlement in the court's history. He was also a member of the teams that prosecuted BFA's cases against Granite Construction Inc., Allianz Global Investors U.S., L.L.C., Bioventus, Inc., Elastos, and Enochian Biosciences, Inc. George is currently on the teams litigating BFA's securities cases against Five9, Inc., Twist Bioscience Corp., Toronto-Dominion Bank, CVS Health Corporation, and Citigroup.

George has extensive experience managing all phases of complex civil litigation, from pre-suit investigation through motion practice, discovery, summary judgment, and trial. Prior to joining the firm, he was an associate and later junior partner at a large global law firm, where he took and defended depositions, worked with expert consultants and witnesses, regularly appeared in court, and handled numerous internal investigations and investigations by both the U.S. Department of Justice and the U.S. Securities and Exchange Commission. George has represented clients in connection with complex regulatory enforcement matters dealing with, among other things, securities fraud, commodities fraud, and foreign bribery issues, and has advised transactional teams on litigation and compliance related risks.

George earned his J.D. from Brooklyn Law School, where he served as a student prosecutor in the Kings County District Attorney's office and led the prosecution of misdemeanor domestic violence cases. He also interned at the New York City Police Department, the U.S. Attorney's Office for the Eastern District of New York, the Federal Trade Commission, and the New York Attorney General's Office.

He is admitted to practice in New York (2012), the Eastern District of New York (2013), and the Southern District of New York (2014).

BENJAMIN F. BURRY
Partner

New York

- Email: bburry@bfalaw.com
- Tel: +1 212 789 1345
- www.bfalaw.com/professionals/benjamin-burry

Benjamin F. Burry is a partner at BFA and concentrates his practice on prosecuting complex securities and investment-related matters on behalf of institutional investors. Benjamin was a member of the teams that prosecuted the securities class actions against Teva Pharmaceutical Industries, Ltd., Granite Construction Incorporated, Elastos Foundation, Gatos Silver, Inc., and Bioventus, Inc. a member of the team that prosecuted breach of contract and fiduciary duty claims against Allianz Global Investors U.S., L.L.C, and is currently a member of the teams prosecuting securities class action cases against Citigroup, Toronto-Dominion Bank, Twist Bioscience Corp., and Five9, Inc.



Benjamin has substantial experience representing clients in a broad range of complex commercial and statutory litigation matters, including securities class actions, shareholder derivative litigation, contract and investment disputes, intellectual property disputes, actions involving a wide array of business torts, fraud, breach of fiduciary duty, and bankruptcy litigation, as well as cases involving the Federal Arbitration Act. He has represented clients in federal and state courts throughout the United States, including bankruptcy court, as well as in arbitration forums, private mediation, and enforcement proceedings.

Benjamin also maintains an active pro bono practice, and has represented New York City parks and community gardens in civil litigation as well as in matters involving corporate governance, land rights, local law and regulations, licensing and leases.

Prior to joining BFA, Benjamin was a senior associate at an AmLaw 50 law firm, where he was a member of the firm's securities and shareholder litigation, commercial litigation and disputes, and Supreme Court and appellate practices. After earning his law degree from The University of Chicago Law School, Benjamin served as law clerk to the Honorable Susan P. Read of the New York Court of Appeals.

Benjamin earned a B.A., *magna cum laude*, from Illinois Wesleyan University in 2007 and a J.D. from the University of Chicago Law School in 2010. Benjamin is admitted to practice in the U.S. Court of Appeals for the Second Circuit (2014), the U.S. District Courts for the Southern and Eastern Districts of New York (2013), New York (2011), and Tennessee (2013).

MATTHEW MILLER
Partner

Delaware

- Email: mmiller@bfalaw.com
- Tel: +1 302 499 2630
- www.bfalaw.com/professionals/matthew-miller

Matthew Miller is a Partner at BFA. He focuses his practice on representing investors in class action and derivative breach of fiduciary duty litigation. Matt has practiced before Delaware state and federal courts for more than a decade, with the core of his experience being litigation before the Delaware Court of Chancery. He has stand-up trial experience and has successfully argued numerous dispositive and other motions. Matt also has extensive experience taking and defending depositions.

Matt represented large appraisal petitioners in the consolidated fiduciary duty and appraisal action *In re Dole Food Co., Inc. Stockholder Litigation/In re Appraisal of Dole Food Company, Inc.*, in which the Delaware Court of Chancery found fraud and breaches of fiduciary duty that led to post-trial damages of nearly \$150 million. In *Cygnus Opportunity Fund, LLC v. Washington Prime Group, LLC*, Matt presented written and oral arguments that led to a published opinion denying two motions to



dismiss. That litigation remains ongoing. Matt also successfully represented a special litigation committee in *In re Baker Hughes, a GE Company, Derivative Litigation*, which resulted in new law in that area. Matt has represented several litigation demand review committees.

Matt is currently a member of the teams litigating derivative claims against the current and former directors and officers of Wells Fargo and The Boeing Company, as well as the teams litigating class action claims against Focus Financial, Inc. and BioVentrix, Inc.

Before coming to BFA, Matt spent more than a decade at a Delaware corporate and business law boutique focusing on high stakes commercial litigation, where he represented both plaintiffs and defendants, along with appraisal petitioners and respondents. He has extensive experience with valuation and industry experts, and co-wrote an article addressing the relationship between appraisal fair value and fiduciary duty fair price. The article—“Fair Price for Delaware Fiduciary Actions Can Exceed Appraisal Fair Value”—was published in the *Business Valuation Review* and appeared on the Harvard Law School Forum on Corporate Governance.

Matt earned a J.D. from the University of Virginia School of Law, where he graduated *Order of the Coif*. Matt is admitted to practice in Delaware (2013) and the U.S. District Court for the District of Delaware (2013).

LISA BUCKSER-SCHULZ
Chief Administrative Partner

New York

- Email: lbuckersschulz@bfalaw.com
- Tel: +1 212 789 1340
- www.bfalaw.com/professionals/lisa-bucker-schulz

Lisa Buckser-Schultz is BFA’s Chief Administrative Partner. She brings a unique combination of legal, financial, and operational expertise, with deep experience in litigation, class action administration, and finance. Lisa plays a key role in overseeing and expanding the firm’s legal and financial operations.

Prior to joining BFA, Lisa was Director of Financial Operations at the leading legal finance company, Burford Capital, where she spent nine years working closely with the CFO in managing and growing the firm’s finance team, overseeing the firm’s audits and financial reporting process, overseeing the payment process for operating expenses and legal funding, managing the administration of offices in New York, Chicago and London, as well as playing a substantial role in Burford’s compliance, risk management and HR functions.

Lisa graduated from Rutgers College with a B.S. in Accounting and worked as a CPA before earning her J.D. from Fordham Law School. She began her legal career as a defense litigator before making the transition to representing plaintiffs in securities class actions at a prominent plaintiff firm.



Lisa next spent nine years in the class action claims administration business, where she worked at AB Data and Garden City Group as General Counsel and Deputy General Counsel, respectively, while also managing high profile class action administrations.

KENDRA SCHRAMM
Of Counsel

New York

- Email: kschramm@bfalaw.com
- Tel: +1 212 789 1358
- www.bfalaw.com/professionals/kendra-schramm

Kendra Schramm leads BFA's Global Recovery Services, which advises, and acts in a liaison capacity on behalf of, leading institutional investors in connection with securities and investment-related claims pursued outside the United States—the majority of which require a client's formal decision to participate. Kendra is a highly valued litigator with years of experience working on large and complex securities matters.

Kendra provides pragmatic and unbiased advice regarding meaningful recovery opportunities, including the risks and burdens that can arise from pursuing an international claim. Kendra has experience overseeing matters in Australia, Japan, England, the Netherlands, Germany, Denmark, Brazil, and France, among others, on behalf of public pension systems, asset managers, and sovereign wealth funds located around the globe. She recently co-authored "A Look at Shareholder Remedies in Japan," in *Law360* discussing the evolving Japanese litigation regime.

Kendra is instrumental to the firm's outreach to prospective clients and ongoing client relations, and also works with the firm's Client Monitoring and Case Evaluation Group, assisting in the assessment and prosecution of domestic securities class actions.

Prior to joining BFA, Kendra was an associate at another plaintiffs' securities firm, where she was a member of the team that recovered more than \$1 billion in total settlements on behalf of investors in the landmark securities litigation against American International Group and numerous related defendants. Kendra was also instrumental in prosecuting the complex securities litigation against the Federal National Mortgage Association (Fannie Mae), which persuasively alleged that investors' losses were caused by Fannie Mae's statements and actions rather than the financial crisis, and resulted in a \$170 million settlement.

Kendra earned a B.A. from New York University and a J.D. from Brooklyn Law School (2011), where she was an Associate Managing Editor of the *Journal of Law & Policy*. During law school, she served as a law clerk to the Honorable Elizabeth S. Stong, U.S. Bankruptcy Court Judge for the Eastern District of New York. She is admitted to practice in New York (2012), New Jersey (2012), the U.S. Supreme Court



(2014), and the U.S. District Courts for the Southern District of New York (2012) and the District of New Jersey (2012).

DAVID MACISAAC
Of Counsel

New York

- Email: dmacisaac@bfalaw.com
- Tel: +1 212 789 3606
- www.bfalaw.com/professionals/david-macisaac

David MacIsaac is Of Counsel at BFA. His practice focuses on investigating, analyzing and prosecuting direct and derivative breach of fiduciary duty actions on behalf of stockholders. He is actively pursuing confidential books and records requests on behalf of a number of institutional and individual clients.

For nearly a decade, David has built a track record of success in the Delaware Court of Chancery. He has successfully developed and prosecuted numerous high-profile actions against boards of directors and officers for breaches of fiduciary duty, including *Nantahala Capital Partners L.P. v. QAD Inc. et al.*, a direct action that successfully enjoined a merger on basis of inadequate disclosures and settled for \$65 million; *Macomb County Employees' Retirement System v. Kenneth McBride et al.* (Stamps.com) a derivative action that settled for \$30 million plus corporate governance reforms; and *In re Versum Materials, Inc. Stockholder Litigation*, a direct action that resulted in the revocation of a poison pill. David also played a key role in *In re Pattern Energy Group Inc. Stockholder Litigation*, a direct action that successfully challenged a \$6.1 billion merger transaction, and settled for \$100 million.

David has also litigated several derivative actions related to the opioid crisis, including *Ontario Provincial Council of Carpenters' Pension Trust Fund et al. v. Walton et al.* (Walmart Inc.), a derivative action that settled for \$123 million plus corporate governance reforms; and *In re McKesson Corporation Derivative Litigation*, a derivative action that settled for \$175 million plus corporate governance reforms. Other significant representations include *City of Monroe Employees' Retirement System v. Rupert Murdoch et al.*, a derivative action arising from sexual harassment at Fox News that settled for \$90 million plus corporate governance reforms; and *In re Yahoo, Inc. Derivative Litigation*, which arose from the largest data breach in U.S. history and settled for \$29 million.

Prior to joining the plaintiffs' bar, David served as an associate at a prominent global law firm, where he litigated a wide array of complex matters. He earned his Juris Doctor *cum laude* from Georgetown University Law Center and received his bachelor's degree from Franklin & Marshall College. David is admitted to practice in New York (2014).



GREGORY S. MULLENS
Of Counsel

New York

- Email: gmullens@bfalaw.com
- Tel: +1 415 445 4006
- www.bfalaw.com/professionals/gregory-mullens

Greg Mullens is Of Counsel at BFA. He has over a decade of experience litigating complex matters in the public and private sectors, in state and federal court. He is an accomplished trial attorney with over forty trials under his belt, including acting as first-chair on ten jury trials to verdict. Greg currently focuses his practice on complex investigations and litigation of antitrust and consumer matters.

Greg is involved in several of the firm's antitrust and consumer investigations and litigations, including, among others, *In re Google Generative AI Copyright Litigation*, *In re Allstate & Arity Consumer Privacy Litigation*, *In re Bank of America Unauthorized Account Opening Litigation*, *Calhoun, et al. v. Google LLC*, *In re Google RTB Consumer Privacy Litigation*, *White v. Samsung Electronics America, Inc. et al.*, and *Ji et al. v. Naver Corporation et al.*

Before joining BFA, Greg was Counsel at a litigation boutique in New Jersey, where he regularly led internal investigations and ran the defense of individual and corporate clients in a wide range of federal and state matters, including those involving the U.S. Department of Justice, U.S. Attorneys' Offices, Offices of Inspectors General, and State Attorneys General.

Greg began his legal career as a prosecutor for the Hudson County Prosecutor's Office in New Jersey. After serving in the trial division, Greg was promoted to the Office's Gangs and Narcotics Task Force, where he led the specialized unit's investigation and prosecution of high-priority criminal targets, including RICO enterprises, money laundering networks, firearms and narcotics traffickers, and street gangs.

Before becoming an attorney, Greg was a pitcher for the New York Mets in their minor league system. He is proud to be the first Tibetan professional baseball player.

Greg earned his B.A. from Columbia University (2006), and his J.D. from Benjamin N. Cardozo School of Law (2012), where he was the Articles Editor of the Journal of International and Comparative Law. He is admitted to New York (2013), New Jersey (2012), U.S. Court of Appeals for the Third Circuit (2022), the Southern District of New York (2018), Eastern District of New York (2018), and District of New Jersey (2018).



THAYNE STODDARD
Of Counsel

New York

- Email: tstoddard@bfalaw.com
- Tel: +1 212 789 1355
- www.bfalaw.com/professionals/thayne-stoddard

Thayne Stoddard is Of Counsel at BFA and represents investors in complex securities class actions and shareholder derivative suits across the country. Thayne has substantial experience in all aspects of litigation, including investigating and drafting claims, briefing dispositive and other motions, managing discovery efforts, taking depositions, working closely with experts, and preparing for and attending trial.

Thayne was a member of the teams that prosecuted the firm's derivative stockholder action against Tesla's Board of Directors in the Delaware Court of Chancery resulting in a settlement valued at \$919 million, as well as cases against Teva Pharmaceutical Industries, Ltd., resulting in a \$420 million settlement, and Granite Construction Inc., resulting in a \$129 million settlement. Thayne is currently a member of the teams litigating securities-related claims against Citigroup, Inc., and derivative claims on behalf of Boeing.

Prior to joining BFA, Thayne was an associate at a prominent global law firm, where he litigated a wide array of complex cases.

Thayne earned a B.A. from Yale University in 2007, a J.D. from Duke University School of Law in 2014, and an M.A. from Duke University in 2014. Thayne is admitted to practice in New York (2015) and the U.S. District Court for the Southern District of New York (2016).

MICHAEL STISCAK
Of Counsel

New York

- Email: mstiscak@bfalaw.com
- Tel: +1 212 789 3616
- www.bfalaw.com/professionals/Michael-stiscak

Mike joins BFA is Of Counsel at BFA. He joined the firm after serving 32 years with the Chicago Police Department and retiring as a Lieutenant.

During his time with the Chicago Police Department, Mike served as the President-Trustee of the Chicago Police Pension Fund, where he was actively involved in evaluating securities class actions in which the Pension Fund had exposure. He also served as the President of the Chicago Police Lieutenant's Union. Mike earned his J.D. in 2001 from the University of Illinois Chicago (formerly John Marshall Law School) and has been practicing law for the past 20 years.



ANTONIO J. SAGUIBO
Of Counsel

California

- Email: asaguibo@bfalaw.com
- Tel: +1 415 445 4003
- www.bfalaw.com/professionals/antonia-saguibo

Anthony Saguibo is Of Counsel at BFA. Tony strengthens the firm's client development objectives by serving as a subject matter expert on the oversight and management of Multiemployer Labor Funds and Collective Bargaining Units within the workplace. He has a long history of cultivating new client relationships and consultant partnerships within the Labor Community, and is an active member of the community who participates in labor events as an attendee and conference speaker on a regular basis.

Before joining the firm, Tony worked at Quantum Health where he was responsible for building a Labor Market vertical supporting the introduction of independent navigation services to union sponsored health programs. Prior to that, Tony served in several different senior roles for the Blue Cross Blue Shield Association, including as Vice President of Sales at Blue Cross Blue Shield of Hawaii. In each of these roles, he supported Labor Funds and Labor Trustees on developing and deploying strategies designed to assure fiscal oversight of their Funds and protect member benefits.

Prior to joining the benefits sector, Tony served as General Counsel for LIUNA, Local 368, where he supported all in-house legal matters and collaborated with outside counsel as necessary. He also served as an officer for the Local Union, as well as a member of the Board of Trustees on the Union's multiple benefit funds. Immediately prior to joining LIUNA, Tony worked in private practice in San Diego in the areas of Workmen's Compensation and Construction Defect Litigation.

Tony's long-term support of the Labor Community has provided him with a great understanding of the unique needs and expectations of Organized Labor, and working for LIUNA equipped him with direct insight into the key considerations Labor Trustees face ensuring long term sustainability of their benefit funds.

Tony is received his J.D. from the University of San Diego School of Law and is admitted to practice in California and Hawaii.

SARA PILDIS SIMNOWITZ
Special Counsel

New York

- Email: ssimnowitz@bfalaw.com
- Tel: +1 212 789 2309
- www.bfalaw.com/sara-simnowitz

Sara Pildis Simnowitz serves as BFA's General Counsel, providing counsel and advice to the firm and its lawyers on a wide range of legal, compliance, ethics, professional responsibility and risk management matters. Sara also represents



institutional investors, consumers, corporations and public entities pursuing complex securities, antitrust and consumer claims, and was a member of the teams prosecuting the successfully resolved cases against Teva Pharmaceutical Industries, Ltd., Granite Construction Incorporated, as well as the recently resolved *In re: Facebook, Inc. Consumer Privacy User Profile Litigation*, which settled for \$725 million—the largest recovery in a data privacy class action to date.

Sara has over twenty years of experience in all aspects of litigating complex matters, from pre-suit investigation through motion practice, discovery, summary judgment, trial and appeals, and considerable courtroom experience ranging from arguing critical dispositive motions to examining witnesses at trial and arguing appeals. She also has extensive experience taking and defending depositions and working with expert consultants and witnesses.

Prior to joining BFA, Sara was an attorney at other prominent law firms, where she focused on complex commercial and securities matters and handled internal investigations and investigations by both the U.S. Department of Justice and the U.S. Securities and Exchange Commission.

Sara earned a B.A., *summa cum laude*, from Brandeis University, a J.D. from the University of Chicago Law School (2001), and an M.A. from the London School of Economics and Political Science (2002). She is admitted to practice in Massachusetts (2002), New York (2006), the U.S. Supreme Court (2008), the U.S. Court of Appeals for the First Circuit (2003), and the U.S. District Courts for the District of Massachusetts (2002), the Southern and Eastern Districts of New York (2006), and the Western District of New York (2008).

STEPHANIE BARTONE
Associate

New York

- Email: sbartone@bfalaw.com
- Tel: +1 212 789 3606
- www.bfalaw.com/professionals/stephanie-bartone

Stephanie Bartone is an associate at BFA and a member of the Global Recovery Services Group. She advises leading institutional investors on pursuing securities and investment-related claims worldwide, and provides comprehensive consulting and liaison services to help clients evaluate and maximize recovery opportunities.

Stephanie has nearly a decade of experience representing clients in large-scale securities and consumer related class action lawsuits in both federal and state courts. She draws on her substantial securities litigation experience to help institutional clients navigate complex global recovery landscapes.

Prior to joining BFA, Stephanie was an associate at a nationally recognized securities litigation firm where she litigated complex class actions including securities fraud, consumer fraud, and mergers & acquisitions class actions on behalf of individual and institutional plaintiffs. She most recently served as an attorney at



the Connecticut Department of Consumer Protection, overseeing the regulation and implementation of newly enacted legislation authorizing online casino gaming, online sports betting, and online fantasy contests in the State of Connecticut.

Stephanie earned a B.A., *summa cum laude*, from the University of New Hampshire (2008) and a J.D. from the University of Connecticut School of Law (2012), where she served as Symposium Editor for the Connecticut Law Review. Stephanie is admitted to practice in Connecticut (2012), the Commonwealth of Massachusetts (2012), New York (2023), the District of Connecticut (2015), the Second Circuit Court of Appeals (2018) and the Third Circuit Court of Appeals (2020).

NICHOLAS DENNANY
Associate

New York

- Email: ndennany@bfalaw.com
- Tel: +1 212 789 1354
- www.bfalaw.com/professionals/nicholas-dennany

Nicholas J. Dennany is an associate at BFA and focuses his practice on investigating and analyzing pending and potential complex securities matters on behalf of the firm's institutional investor clients.

For more than seven years, Nick has been a key member of BFA's Client Monitoring and Case Evaluation Group, where, together with a team of attorneys and financial analysts, he develops and recommends legal strategies to the firm's clients to protect and preserve their investments and rights as shareholders.

Nick has also played a key role as a member of the firm's securities litigation team and has more than a decade of litigation experience. He contributed to the firm's discovery efforts in *In re Genworth Financial Inc. Securities Litigation*, which resulted in a settlement of \$219 million, a record for securities litigations in the Eastern District of Virginia, and played a key role in the litigation of *In re MF Global Holdings Limited Securities Litigation* in connection with the company's dramatic collapse on October 31, 2011. Nick managed the firm's staff attorney discovery team through a complex discovery process involving the production of over 46 million pages of documents and dozens of depositions coordinated across multiple MF Global litigations. This effort culminated in a recovery by plaintiffs of more than \$234 million, resolving claims against MF Global's former officers and directors, underwriter defendants, and outside auditor.

Before joining the firm, Nick was an attorney at a prominent plaintiffs' law firm, where he was a member of the teams that successfully litigated and ultimately secured significant settlements in *In re Broadcom Corp. Securities Litigation* (\$173.5 million) and *In re NovaGold Resources Inc. Securities Litigation* (\$28 million CDN).

Nick earned a B.A., *cum laude*, from the University of Florida and a J.D. from the University of Florida, Levin College of Law (2004). He is admitted to practice in New



York (2006) and the U.S. District Courts for the Southern and Eastern Districts of New York (2021).

JOSHUA SAMRA
Associate

Oakland

- Email: jsamra@bfalaw.com
- Tel: +1 415 445 4017
- www.bfalaw.com/joshua-samra

Josh Samra is an associate in the Firm's Antitrust and Consumer practice group, and is involved in all aspects of the Firm's antitrust and consumer investigations and litigations. Josh was a significant member of the team litigating *In re: Facebook, Inc. Consumer Privacy User Profile Litigation*, which resulted in the largest privacy class action settlement in history at \$725 million. Josh currently plays an important role in the teams litigating *Ji, et al. v. Naver Corp., et al.*, *In re Local TV Advertising Antitrust Litigation*, *In re Bank of America Unauthorized Account Opening Litigation*, *In re Wells Fargo & Co. Consolidated Derivative Shareholder Litigation*, *In re Google Generative AI Copyright Litigation*, and *In re Google RTB Consumer Privacy Litigation*.

Josh has been named to the "Northern California Rising Stars" list by Thompson Reuters *Super Lawyers* for years 2023-2025.

Prior to joining BFA, Josh was a Deputy District Attorney in Contra Costa County. As a Deputy D.A., Josh oversaw all parts of criminal prosecutions, including arguing pre-trial motions, trying cases before a jury, and litigating post-trial appeals. Josh has prosecuted ten jury trials to verdict.

Josh earned his B.A. from the University of California Berkeley (2013) and his J.D. from the University of California Los Angeles (2016), where he served as an Associate Editor for the UCLA Law Review. Josh is admitted to practice in California (2016), and the U.S. District Courts for the Northern and Central Districts of California (2019), and the Eastern District of Michigan (2019).

Josh is an active member and contributor to The Sedona Conference, Working Group 1 on Electronic Document Retention and Production, and Working Group 6 on International Electronic Information Management, Discovery, and Disclosure.

ADAM C. MCCALL
Associate

Oakland

- Email: amccall@bfalaw.com
- Tel: +1 212 789 2303
- www.bfalaw.com/professionals/adam-mccall

Adam C. McCall is an associate at BFA and advises investors concerning their rights and potential claims in complex securities class actions and shareholder derivative suits across the country. Adam has substantial experience in all aspects of litigation, including investigating and drafting claims, briefing dispositive and other motions,



oral argument, managing discovery efforts, taking depositions, working closely with experts, and trial.

Prior to joining BFA, Adam was an associate at a prominent securities litigation firm, where he litigated a wide array of complex cases. Adam’s efforts have helped result in the recovery of over \$100 million for investors.

Adam graduated *cum laude* from the California Western School of Law and received his L.L.M. from Georgetown University Law Center. Adam is admitted to practice in California (2014), the District of Columbia (2018), the U.S. District Courts for the Central, Eastern, Northern, and Southern Districts of California (2015), and the Ninth Circuit Court of Appeals (2016).

<p>WILLIAM E. FREELAND <i>Associate</i></p>	<p>New York</p>	<ul style="list-style-type: none"> • Email: wfreeland@bfalaw.com • Tel: +1 212 789 2305 • www.bfalaw.com/professionals/William-freeland
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Billy Freeland is an associate at BFA and prosecutes complex securities class actions and shareholder derivative suits across the country on behalf of investors. Billy has substantial experience in all aspects of litigation, including investigating and drafting claims, briefing dispositive and other motions, managing discovery efforts, working closely with experts, and preparing for trial. He is currently a member of the team litigating securities-related claims against Boeing and CVS Health Corporation.

Billy is a Lieutenant in the United States Navy Reserve, where he is an Intelligence Officer. He is an active member of the Federal Bar Council, the LGBT Bar Association of New York, and the New York City Bar Association, where he recently served as co-secretary of the Securities Litigation Committee.

Prior to joining BFA, Billy was an associate at a prominent securities litigation firm, where he represented individuals and institutional clients in securities fraud class actions. Billy received his J.D. from New York University School of Law, where he served as articles editor for the *Annual Survey of American Law*, was a finalist in the Orison S. Marden Moot Court Competition for two years in a row, and worked as a research assistant to Professors Rachel Barkow and Catherine Sharkey. While attending law school, Billy was a law clerk for Senator Charles E. Schumer on the United States Senate Committee on the Judiciary. He received both his M.A. in International Affairs and his B.A. in Political Science from Columbia University.

Billy is admitted to practice in New York (2016).



FREDERICK WILLIAM GREEN
Associate

New York

- Email: wgreen@bfalaw.com
- Tel: +1 212 789 1348
- www.bfalaw.com/professionals/frederick-green

Frederick William ("Will") is an associate at BFA, focusing on complex securities fraud litigation. Will has substantial experience in a variety of aspects of litigation, including investigating and drafting claims, briefing dispositive motions, and managing discovery efforts. He was a member of the litigation teams that successfully prosecuted the firm's cases against Teva Pharmaceutical Industries, Ltd. (\$420 million recovery); Granite Construction Inc. (\$129 million recovery); Talis Biomedical Corporation (\$32.5 million recovery); and Bioventus Inc. (\$15.25 million recovery).

Will is currently a member of the teams litigating securities-related claims against Citigroup, Inc., Five9, Inc., and Toronto-Dominion Bank.

Will received a B.A. from Union College (2009) and a J.D. from Washington University in St. Louis (2013). Will is admitted to practice in New York (2015) and Massachusetts (2013).

ROBERT LACKEY
Associate

Delaware

- Email: rlackey@bfalaw.com
- Tel: +1 302 499 2317
- www.bfalaw.com/professionals/robert-lackey

Robert Lackey is an associate at BFA and focuses his practice on representing stockholders in direct and derivative actions in the Delaware Court of Chancery, in addition to other courts. Robert has experience conducting stockholder investigations under *8 Del. C. § 220* and litigating the enforcement of those investigations, as well as litigating claims for breaches of fiduciary duty, breaches of contract, and other commercial torts.

In addition to a number of confidential investigations, Robert is currently a member of the teams litigating derivative claims against the Boards of Directors of Wells Fargo, The Boeing Company, Focus Financial, Inc. and BioVentrix, Inc. Robert has also been a part of the team litigating Section 220 matters investigating The Boeing Company and Globe Life Inc.

Prior to joining BFA, Robert was an associate at another well-regarded plaintiffs' firm where he developed expertise in litigating before the Delaware Court of Chancery.

Robert received a B.S. in Economics from the University of Delaware (2017) and a J.D. *cum laude* from American University, Washington College of Law (2020). Robert is admitted to practice in Delaware (2022).



WILLIAM A. MASSA
Associate

New York

- Email: wmassa@bfalaw.com
- Tel: +1 212 789 3603
- www.bfalaw.com/professionals/william-massa

Billy Massa is an associate at BFA and focuses his practice on identifying, investigating, and prosecuting securities fraud class actions.

Billy is a member of the firm's client monitoring and case evaluation group in which he, together with a team of attorneys and financial analysts, identifies and develops securities fraud class actions to protect investors from corporate misconduct. He has published a number of articles focused on investor protection in the newsletters of leading public pension organizations NCPERS and GAPPT.

Prior to joining BFA, Billy was an associate at a prominent securities litigation firm, where he prosecuted securities fraud class actions. Billy graduated *cum laude* from Fordham University School of Law, and graduated *summa cum laude* from Stony Brook University with a major in economics before earning his MBA from the same university. At Stony Brook, he was the recipient of the H. Lee Dennison Valedictorian Award.

Billy is admitted to practice in New York (2021) and U.S. District Courts for the Southern and Eastern Districts of New York (2021).

BRANDON A. SLOTKIN
Associate

New York

- Email: bslotkin@bfalaw.com
- Tel: +1 212 789 3617
- www.bfalaw.com/professionals/brandon-slotkin

Brandon Slotkin is an associate at BFA and represents investors in securities class actions and related litigation. Brandon leverages his prior experience representing both plaintiffs and defendants to deliver optimal results for his clients. Brandon is currently a member of the teams litigating securities claims against CVS and derivative actions involving The Boeing Company.

Prior to joining BFA, Brandon was an associate at a prominent plaintiffs' securities litigation firm, where he represented investors in securities class actions. Brandon was also an associate at a notable defense firm, where his practice areas included securities, Delaware and derivative actions, and white-collar investigations.

Brandon earned a JD/MBA from Cornell Law School and Cornell Johnson Graduate School of Management. He served as an Articles Editor for the *Cornell Journal of Law and Public Policy* and as an Associate for the Legal Information Institute's *Supreme Court Bulletin*. He also served as an Honors Fellow for the Cornell Lawyering Program and was a full-time semester-long extern at the U.S. Securities and Exchange Commission.



Brandon is admitted to practice in New York (2022) and the Fifth Circuit Court of Appeals (2023).

FRANKLYN WILLIAMS
Senior Projects Attorney

New York

- Email: fwilliams@bfalaw.com
- Tel: +1 212 789 1357
- [www.bfalaw.com /professionals/franklyn-williams](http://www.bfalaw.com/professionals/franklyn-williams)

Franklyn Williams is a senior projects associate at BFA and a part of the litigation team prosecuting complex securities fraud on behalf of institutional investors.

With over decade of legal experience, Franklyn was an integral part of the teams that successfully litigated over a dozen securities cases, including *In re Teva Securities Litigation* (\$420M settlement), *The Police Retirement System of St. Louis v. Granite Construction Inc.* (\$129M settlement), *In re Talis Biomedical Securities Litigation* (\$32.5M settlement), *Blinsky v. Gatos Silver, Inc.* (\$21M settlement), *Ciarciello v. Bioventus* (\$15.25M settlement), *Colwell v. Excicure Inc.* (\$5.25M settlement), and *Owen v. Elastos Foundation* (\$2M settlement).

Franklyn received his J.D. from Boston University School of Law where he served as the Editor in Chief of the *Boston University International Law Journal* and participated in the Civil Litigation Clinic. He earned his B.A. from Cornell University with a minor in law & society and majors in both government and philosophy. While attending Cornell, Franklyn externed with Judge Patricia Anne Williams of the Bronx County Supreme Court and summer interned with both the NYC Human Resources Association Bureau of Fraud Investigation and the NYC Administration for Children's Services Legal Division.

Franklyn is admitted to practice in New York (2008) and New Jersey (2007).

JOOYOUNG KOO
Projects Associate

Oakland

- Email: jkoo@bfalaw.com
- Tel: +1 415 445 4003
- [www.bfalaw.com /professionals/jooyoung-koo](http://www.bfalaw.com/professionals/jooyoung-koo)

Jooyoung Koo is a Project Associate at BFA. She brings a wealth of experience as an attorney to her role. Jooyoung has a strong background in intellectual property, antitrust, consumer protection, and pharmaceutical product liability cases. Her ability extends to conducting meticulous document review and insightful research analysis across a diverse range of complex legal matters.

Jooyoung is fluent in Korean.

Jooyoung earned her J.D. from DePaul University College of Law (2012) and a B.S. from Northwestern University (2008), and is admitted to practice in Illinois (2013), New York (2013), and Washington (2015). She is also fluent in Korean.



KATHERINE SULLIVAN
Projects Associate

Oakland

- Email: ksullivan@bfalaw.com
- Tel: +1 415 445 4014
- www.bfalaw.com/katherine-sullivan

Katherine Sullivan ("Kasey") is a projects associate at BFA. She joined the firm in 2016.

Kasey brings over two decades of experience in business and employment litigation and e-discovery to BFA. She currently plays a significant role in managing plaintiff discovery and class member communication in the *In re Facebook, Inc. Consumer Privacy User Profile Litigation* case. She also works on discovery matters in the *In re Local TV Advertising Antitrust Litigation*, *Google Chrome Sync Privacy Litigation*, and the *In re Domestic Airlines Travel Antitrust Litigation*, and collaborates with others in the Oakland office to develop new cases involving consumer rights and privacy rights.

Kasey earned her J.D. from Northwestern University School of Law, where she worked at the Bluhm Legal Clinic on cases involving special education, juvenile justice, and asylum for unaccompanied minors. She is admitted to practice in California.

MARGARET STRAKOSCH
Projects Associate

Oakland

- Email: mstrakosch@bfalaw.com
- Tel: +1 415 445 40003
- www.bfalaw.com/margaret-strakosch

Margaret ("Margo") Strakosch is a projects associate at BFA. She joined the firm in 2020 and works with the Consumer, Privacy & Antitrust Litigation team.

Margo plays a significant role in many aspects of BFA's litigation, including legal research and analysis, case development, and discovery efforts against defendants in major class actions including *In re Local TV Advertising Antitrust Litigation* and *In re Facebook, Inc. Consumer Privacy User Profile Litigation*.

Prior to joining BFA, she clerked for Alaska Supreme Court Justice Susan M. Carney and for the U.S. Department of Labor's Office of Administrative Law Judges.

While at the University of Michigan Law School, Margo served as an Executive Editor of the *Michigan Journal of International Law*. Before law school, she completed two years of AmeriCorps service with City Year Boston and worked at an electronics trade-in startup.

Margo earned her J.D. from the University of Michigan Law School (2015) and a B.A. from the Thomas More College of the Liberal Arts (2008). While at the University of Michigan Law School, Margo served as an Executive Editor of the *Michigan Journal of International Law*. Margo is admitted to practice in California (2018).



SYLVIA SUM
Staff Associate

Oakland

- Email: ssum@bfalaw.com
- Tel: +1 415 445 4003

Sylvia joined the Firm in 2016, and is a staff associate at BFA's Oakland office where she focuses on prosecuting consumer and antitrust class actions. Sylvia brings over twenty years of experience to BFA. She has played a meaningful role in litigating several matters including *In re Volkswagen "Clean Diesel" Marketing, Sales Practices, and Products Liability Litigation* and *In re Chrysler-Dodge-Jeep EcoDiesel Marketing, Sales Practices, and Products Liability Litigation*. In each of these litigations, Sylvia's German language skills have been critical in analyzing the evidence underlying plaintiffs' claims.

Sylvia earned her J.D. from the UC Los Angeles School of Law (1997), and is admitted to practice in California (2000) and Oregon (1997).

GLEN TSURUDOME
Staff Associate

Oakland

- Email: gtsurudome@bfalaw.com
- Tel: +1 415 789 1348

Glen joined BFA's Oakland office in 2019. Glen brings nearly two decades of experience to his role as staff associate, where he focuses on prosecuting consumer and antitrust class actions. Glen is a key member of the team litigating *Calhoun, et al. v. Google LLC* and played a significant role in *In re: Facebook, Inc. Consumer Privacy User Profile Litigation*.

Glen received a B.A. from the UC San Diego (1996) and a J.D. from the University of San Francisco School of Law (2005). Glen has also completed the Yamasa Institute Academic Intensive Japanese Program (2012). Glen is admitted to practice in California (2005).

JENNIFER JURMARK
Senior Discovery Operations
Manager

New York

- Email: jjurmark@bfalaw.com
- Tel: +1 212 789 1340
- www.bfalaw.com/professionals/Jennifer-jurmark

Jennifer Jurmark is Senior Discovery Operations Manager at BFA, where she oversees daily discovery operations firmwide and manages large scale document reviews. Jennifer works closely with BFA attorneys and external stakeholders on the strategy and implementation of eDiscovery protocols for complex high-stakes litigation, leveraging AI and Data Analytics to optimize evidence gathering and case analysis.



Jennifer helped lead the eDiscovery efforts and designed and implemented workflows for document reviews as a member of the teams that prosecuted the securities actions concerning Teva Pharmaceuticals Industries Ltd, Granite Construction Inc, Bioventus, Inc., Talis, and Allianz Global Investors U.S. LLC, as well as the firm's derivative action against certain current and former members of Tesla's Board of Directors. Currently, she manages the eDiscovery efforts as a member of the teams litigating BFA's derivative case on behalf of Boeing.

Jennifer has nearly seventeen years of experience working at the intersection of law, business and technology. Prior to joining BFA, Jennifer worked at large financial institutions and law firms. In her prior roles, she gained extensive experience managing and leading eDiscovery efforts for multiple complex investigations and litigations using cutting edge technology, advising senior stakeholders daily, and running large document review teams.

Jennifer provides pro-bono event management for the United Nations at the United Nations Global Compact, which advances the rule of law by engaging responsible businesses to support building and strengthening the legal frameworks where they operate.

Jennifer received a J.D. from Benjamin N. Cardozo School of Law (1999) and a B.A. from Barnard College of Columbia University (1995).

<p>CHRISTOPHER CAPUOZZO <i>Director, Client Data and Claims</i></p>	<p>New York</p>	<ul style="list-style-type: none"> • Email: ccapuozzo@bfalaw.com • Tel: +1 212 789 2307 • www.bfalaw.com/professionals/christopher-capuozzo
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Chris Capuozzo is Director, Client Data and Claims at BFA, and manages a team of analysts dedicated to the evaluation of client exposure to alleged securities fraud. The team is at the vanguard of the firm's efforts to recover funds by preparing and submitting class action claims on behalf of institutional investor clients.

With over twenty years of experience in the securities class action field, Chris monitors client portfolios to identify and evaluate investment losses and potential opportunities for BFA clients to serve as lead plaintiff, to participate in direct or derivative actions, to join class action litigation in non-U.S. jurisdictions, and to recover from class action settlements.

Prior to joining BFA, Chris was a Data Analytics Manager at a securities litigation firm, where he managed a team of analysts providing portfolio monitoring services to the firm's client base. Chris was also a Research Analyst at a global leader in class action recovery services. He began his career at a prominent claims administrator, where he processed electronically filed claims from financial institutions across the globe.



Chris received a Bachelor of Arts from New York University.

VICTORIA TSE <i>Senior Data Analyst</i>	New York	<ul style="list-style-type: none"> Email: vtse@bfalaw.com Tel: +1 212 789 3601 www.bfalaw.com/professionals/victoria-tse
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Victoria Tse is a senior data analyst at BFA, where she monitors client portfolios to identify and evaluate investment losses, exposure to financial fraud, and potential opportunities for BFA clients to serve as lead plaintiff, to participate in direct actions, to join class action litigation in non-U.S. jurisdictions, and to recover from class action settlements.

In assessing client exposure, Victoria evaluates recovery opportunities for clients based on court-approved loss methodologies for a wide variety of securities fraud allegations. She also helps oversee the acquisition of client investment data from custodians on a monthly basis, and maintains clients' accounts by performing annual reviews.

Prior to joining the BFA, Victoria was a senior data analyst at a securities litigation firm.

ELAINE RIVERA <i>Senior Data Analyst</i>	New York	<ul style="list-style-type: none"> Email: erivera@bfalaw.com Tel: +1 212 789 3604 www.bfalaw.com/professionals/elaine-rivera
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Elaine Rivera is a senior data analyst at BFA, where she monitors and analyzes client exposure to financial fraud and evaluates investment losses and potential opportunities for clients to serve as lead plaintiff. In assessing client exposure, she evaluates recovery opportunities for clients based on court-approved loss methodologies for a wide variety of securities fraud allegations.

Elaine also specializes in antitrust settlement claims. In efforts to maximize potential recoveries, she reviews client eligibility, works with claims administrators, and submits the necessary documentation necessary to file a claim. She also assists in determining client eligibility to participate in international securities cases and class action settlements.

Prior to joining BFA, Elaine was a data analyst at a securities litigation firm.

Elaine received a Bachelor of Arts from Baruch College.



JEFFREY ESPERANCE
Data Analyst

New York

- Email: jesperance@bfalaw.com
- Tel: +1 212 789 2306
- www.bfalaw.com/professionals/jeffrey-esperance

Jeffrey Esperance monitors and analyzes client exposure to financial fraud and evaluates investment losses and potential opportunities for clients to serve as lead plaintiff. In assessing client exposure, he evaluates recovery opportunities for clients based on court-approved loss methodologies for a wide variety of securities fraud allegations.

Jeffrey also assists with determining client eligibility to participate in international securities cases and in class action settlements.

Prior to joining BFA, Jeffrey was a Data Analyst at a securities litigation firm.

Jeffrey received a Bachelor of Arts from Baruch College.

**UMANG NARAYAN
SUHALKA**
Data Analyst

New York

- Email: usuhalka@bfalaw.com
- Tel: +1 212 789 3605
- www.bfalaw.com/professionals/umang-suhalka

Umang Narayan Suhalka is a data analyst at BFA, where he maintains BFA's proprietary database, monitors and analyzes client exposure to financial fraud, and evaluates investment losses and potential opportunities for clients to serve as lead plaintiff. In assessing client exposure, he evaluates recovery opportunities for clients based on court-approved loss methodologies for a wide variety of securities fraud allegations.

Umang also assists with determining client eligibility to participate in international securities cases and in class action settlements.

Prior to joining BFA, Umang interned at a financial services firm.

Umang received a Bachelor of Engineering in Computer Science from the University of Pune and a Masters of Science in Information Technology from New York University.

ALHASSAN BAH
Data Analyst

New York

- Email: abah@bfalaw.com
- Tel: +1 212 789 1351
- www.bfalaw.com/professionals/alhassan-bah

Alhassan Bah is a data analyst at BFA, where he monitors and analyzes client exposure to financial fraud, and evaluates investment losses and potential opportunities for clients to serve as lead plaintiff. In assessing client exposure,



Alhassan evaluates recovery opportunities for clients based on court-approved loss methodologies for a wide variety of securities fraud allegations, and assists with determining client eligibility to participate in international securities cases and in class action settlements.

Prior to joining BFA, Alhassan was an analyst at a financial services firm.

Alhassan received a B.A. from Bloomsburg University of Pennsylvania.

<p>DESIREE TORRES <i>Senior Investigator</i></p>	<p>Oakland</p>	<ul style="list-style-type: none">• Email: mstempler@bfalaw.com• Tel: +1 415 445 4003• www.bfalaw.com/professionals/desiree-torres
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Desiree Torres is a Senior Investigator at BFA, where she works with attorneys to develop facts and witnesses to support the firm’s cases. Desiree conducts investigations in myriad areas of complex civil litigation, including allegations of corporate and securities fraud, violations of shareholder rights, and breaches of fiduciary duties. She draws on decades of fraud investigation experience.

Desiree has a PhD in High Technology Management from the University of Wollongong and an MBA and BSBA in Accounting from the University of Phoenix.

For more information, please visit:
www.bfalaw.com

EXHIBIT 2

Lozada v. TaskUs, Inc.,
No. 1:22-cv-01479

SUMMARY OF BFA TIMEKEEPER QUALIFICATIONS, EXPERIENCE, AND ROLE IN THE LITIGATION

Partners

Benjamin F. Burry (1,258 hours): Mr. Burry is a Partner at BFA and a 2010 graduate of the University of Chicago Law School. Mr. Burry was primarily involved in: (i) conducting discovery, including drafting discovery requests, litigating discovery disputes, and overseeing Plaintiffs' Counsel's analysis of documents produced by Defendants and various third parties; (ii) preparing for and taking fact depositions, including the depositions of Defendants Maddock, Weir, and Sekar, and of a former TaskUs HR executive; (iii) working with Plaintiffs' damages and industry merits experts to develop opening reports; and (iv) participating in the mediation process and settlement negotiations.

Joseph A. Fonti (338.15 hours): Mr. Fonti is a founding Partner of BFA and leads the firm's U.S. Securities Litigation team. He is a 1999 graduate of the New York University Law School. Mr. Fonti oversaw the day-to-day prosecution of the Action, including: (i) overseeing the preparation of the Amended Complaint; (ii) overseeing the preparation of Plaintiffs' opposition to Defendants' motion to dismiss and arguing at the hearing on Defendants' motion; (iii) litigating discovery disputes; (iv) developing litigation strategy at all stages of the case; and (v) leading the mediation process and settlement negotiations.

Evan A. Kubota (863.45 hours): Mr. Kubota is a Partner at BFA and a 2010 graduate of Harvard Law School. Mr. Kubota was primarily involved in: (i) leading the preparation of the Amended Complaint, including overseeing the investigation to interview former TaskUs employees and analyze TaskUs's Glassdoor reviews; (ii) leading the preparation of Plaintiffs' opposition to Defendants' motion to dismiss; (iii) conducting discovery, including litigating discovery disputes; (iv) leading the preparation of Plaintiffs' motion for class certification and the accompanying papers, and working with Plaintiffs' class certification expert on his two reports; (v) developing litigation strategy, including the strategy for Plaintiffs' class certification motion, fact discovery, and fact and expert depositions; (vi) taking and defending fact and expert depositions, including taking the deposition of Defendants' class certification expert, defending two depositions of Plaintiffs' class certification expert, participating in the depositions of four former employees who provided information for the Amended Complaint, Oklahoma's investment manager's Rule 30(b)(6) designee, and Spruce Point's Rule 30(b)(6) designee, and defending the depositions of both Plaintiffs; (vii) working with Plaintiffs' damages and industry merits experts to develop their opening reports; (viii) participating in the mediation process and settlement negotiations; and (ix) leading the preparation of the preliminary approval and final approval motion papers.

Nancy Kulesa (137.9 hours): Ms. Kulesa is a Partner at BFA and a 2001 graduate of the University of Connecticut School of Law. Ms. Kulesa was primarily involved in: (i) the

preparation of the Amended Complaint; (ii) the preparation of Plaintiffs' opposition to Defendants' motion to dismiss; (iii) discovery from Oklahoma, including preparing Oklahoma's Rule 30(b)(6) designee for deposition and collecting and producing Oklahoma's documents; and (iv) participating in the mediation process and settlement negotiations.

Of Counsel

Thayne Stoddard (1,300.55 hours): Mr. Stoddard is Of Counsel at BFA and a 2014 graduate of Duke University School of Law. Mr. Stoddard was primarily involved in (i) researching and drafting the Amended Complaint; (ii) researching and drafting Plaintiffs' opposition to Defendants' motion to dismiss; (iii) researching and drafting Plaintiffs' class certification motion and working with Plaintiffs' class certification expert on his reports; (iv) conducting discovery, including drafting discovery requests and responding to Defendants' discovery requests to Plaintiffs; (v) overseeing preparations for fact depositions, including analysis of Defendants' and various third parties' document productions and preparing Plaintiffs for their depositions; (vi) taking the deposition of Defendant Kumar; (vii) working with Plaintiffs' BPO industry merits expert to develop an opening report; (viii) participating in the mediation process and settlement negotiations; and (ix) drafting the preliminary approval and final approval motion papers.

Associates

Joseph Baier (259.2 hours): Mr. Baier was an Associate at BFA and a 2020 graduate of Duke University School of Law. Mr. Baier was primarily involved in: (i) research regarding discovery disputes; and (ii) preparing for and attending certain fact depositions, including the depositions of three of the former TaskUs employees who provided information for the Amended Complaint.

Mathew Hough (465.85 hours): Mr. Hough was an Associate at BFA and graduated from Boston University School of Law in 2017. Mr. Hough was primarily involved in researching and drafting the Amended Complaint.

Frederick William Green (791.1 hours): Mr. Green is an Associate at BFA and a 2013 graduate of Washington University in St. Louis School of Law. Mr. Green was primarily involved in: (i) research in connection with the Amended Complaint, Plaintiffs' opposition to Defendants' motion to dismiss, and Plaintiffs' class certification motion; (ii) analysis of Defendants' and various third parties' document productions; and (iii) preparing for fact depositions.

Projects Associates/Staff Attorneys

Joseph Guglielmelli (653.2 hours): Mr. Guglielmelli is a Staff Attorney at BFA and a 1981 graduate of Fordham University School of Law. Mr. Guglielmelli was primarily involved in fact discovery, including review and analysis of documents produced by Defendants and various third parties, and preparing for fact depositions.

Peter Patrikios (694 hours): Mr. Patrikios is a Projects Associate at BFA and a 2005 graduate of Quinnipiac University School of Law. Mr. Patrikios was primarily involved in fact discovery, including review and analysis of documents produced by Defendants and various third parties, and preparing for fact depositions.

Franklyn Williams (714.9 hours): Mr. Williams is a Senior Projects Associate at BFA and a 2006 graduate of Boston University School of Law. Mr. Williams was primarily involved in: (i) research in connection with the Amended Complaint, Plaintiffs' opposition to Defendants' motion to dismiss; (ii) analysis of Defendants' and various third parties' document productions; and (iii) preparing for fact depositions.

Litigation Support

Jennifer Jurmark (525.2 hours): Ms. Jurmark is BFA's Senior Discovery Operations Manager. Ms. Jurmark managed the discovery efforts in the Litigation, including analysis and review of Defendants' and third parties' document productions.

Paralegals

Masiel Feliz (190.3 hours): Ms. Feliz is a paralegal at BFA. She was primarily involved in (i) compiling and organizing documents for use in connection with pleadings, motions, and depositions, (ii) maintaining records of documents filed in the Litigation; and (iii) Court filings.