

PHILIP Y. ROWLEY
BERKELEY RESEARCH GROUP, LLC
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EDUCATION

B.A., Public Policy Stanford University

SUMMARY

Philip Rowley is an Executive Director and Chief Revenue Officer of Berkeley Research Group and brings three decades of experience in the management and litigation consulting industry. Named as one of *Consulting* magazine's "Global Leaders in Consulting" for 2018, he has held senior management positions in both public and private entities. His responsibilities included firm wide, regional, and practice area oversight as well as strategy, business development, and marketing disciplines.

Mr. Rowley has led numerous consulting assignments across various industries involving intellectual property, competition, strategy, human capital, and business valuation. His consulting assistance has included financial and economic analysis, license negotiations, organizational development, predictive analytics, and expert witness testimony. He has provided expert witness testimony in federal, state, bankruptcy, and tax courts. He earned a BA in public policy from Stanford University.

PREVIOUS POSITIONS

Charles River Associates
Vice president 2010–2012

Resolution Economics
President, 2008–2009

LECG
Global Head of Business Development and Marketing & Office of the Chairman, 2009–2010
Senior managing director, Labor and Employment and Forensic Accounting sector leader, 2006-2008

Member, Executive Management Committee, 2006–2008
Managing director, Business Development and Marketing, 2002–2006

Peterson Consulting
Managing director, 1999–2002
Vice president, 1994–1999
Principal, 1993–1994
Staff to Executive Consultant, 1986–1993

PROFESSIONAL AFFILIATIONS

Member, Society of Financial Examiners
Diplomat, The American College of Forensic Examiners
Sustaining Member, Insurance Regulatory Examiners Society
Member, American Management Association

BUSINESS AND NOT-FOR-PROFIT AFFILIATIONS

Board member, Pasteurization Technology Group
Board member, The First Tee of The East Bay (TFTEB)
Former president, Fidelity and Surety Claims Association of Northern California

PRESENTATIONS

- (1) “William Blair’s Quarterly Consulting Industry Conference Call Series”
- (2) “IP Valuation; a Critical Component in Transactional and Litigation Strategy, Silicon Valley,” Intellectual Property Law Association
- (3) “Intellectual Property: Valuation and Antitrust Issues,” California CPA Education Foundation, High Tech Industries Conference
- (4) “Issues in Patent Damages,” Los Angeles Intellectual Property Law Association

REPRESENTATIVE ENGAGEMENTS

- Appointed as monitor by the Circuit Court of the Third Judicial Circuit, Madison County, Illinois, as part of the settlement in a class action litigation regarding a provider of total loss automobile valuations to insurance companies. Responsibilities included (1) providing relevant parties, including the court, with annual reports setting forth a status and assessment of certain validation studies mandated as a part of the class action settlement; (2) ensuring the total loss provider complies with its obligation according to the class action settlement; and (3) ensuring the total loss provider continues to supply fair and accurate valuations to insurers and consumers.
- Testified in U.S. District Court for the Northern District of California in a matter involving the calculation of damages associated with breach of contract and breach of fiduciary duty concerning the payment of royalties to retired players of a prominent professional sports union.
- Testified in federal court on antitrust, Lanham Act, and patent infringement damages involving the aftermarket for replacement of ink cartridges.

- Testified in federal court regarding damages in connection with business interference, trade secrets, and breach of contract allegations in the advertising promotions industry.
- Conducted a reasonable royalty analysis related to the patent for "tasteless smoking" as a preservative for processed frozen fish. Analysis considered the cost and benefits of current or competing technologies.
- Testified in an arbitration matter involving breach of contract and Lanham Act allegations relating to a cancelled sporting event. Efforts included damages calculations for plaintiffs, as well as a review of the defendant's damage calculations in a counterclaim.
- Provided filed expert testimony in a \$300 million personal bankruptcy. Analyses including changes in financial position, real estate valuations, alleged preference, and fraudulent conveyances.
- Conducted a complete organizational review of one of the largest private educational trusts in the country, Kamehameha Schools Bishop Estate (KSBE). The review, findings, and recommendations related to issues ranging from the Trust mission, Board of Trustees role, investment compliance, school organization and operations, and outside services. Provided testimony in federal court.
- Testified in an arbitration related to alleged lost profits and property value diminution associated with mold contamination of a newly completed four-star hotel property in Honolulu, Hawaii.
- Related to alleged breach of contract between a property manager of a four-star hotel in Hawaii and a property's investment partnership, performed various forensic accounting exercises, including occupancy levels, room rates, operation expenses, and debt service.
- Developed and implemented rehabilitation management plans and prepared a life insurance company for potential liquidation. These efforts included a thorough analysis of the institution's financial condition, its periodic operating requirements and income, its organization structure, and its accounting and information management systems. Coordinated efforts between the Department of Insurance and guaranty association officials, and advised both parties on the characteristics and impacts of various rehabilitation and liquidation alternatives.
- Conducted a management and operational audit of a state-employee pension fund. Analyses included assessment of management oversight, review of participating institutions' policies and procedures, and recommendations for ongoing loan origination and servicing.
- Supervised the conduct of a management audit of group credit operations for a major insurance company. The analysis entailed the reconciliation of reporting functions between policyholders (financial institutions) and the company. The analysis was conducted across the United States and included approximately 100 institutions.
- Served as the court-appointed referee and fact finder in a payment dispute between a regional third-party administrator and a major financial institution.