



FIRST RESPONSE—*Extra-Record Discovery Requests Post-Glenn*

Presented by DRI's Life, Health and Disability Committee

This webcast is designed to help litigators and in-house counsel understand what to expect when facing extra-administrative record discovery requests subsequent to the Supreme Court's decision in *Metlife v. Glenn*, and how to counsel their clients accordingly. In addition to discussing recent developments and trends in this emerging body of ERISA law, the course will teach you the critical actions that you and your client need to take immediately upon receiving notice, or in anticipation, of a claim or lawsuit. It will also cover discovery burdens and expectations, including new e-discovery requirements and privilege issues. Finally, the course will cover strategies for opposing, and defeating, extra-record discovery requests.

Who Should Attend

- All ERISA litigators, especially those who are not full-time ERISA litigators or who are relatively new to ERISA litigation
- Seasoned ERISA litigators who want to learn about the latest developments in this emerging body of ERISA law
- In-house counsel for companies with ERISA governed products

What You Will Learn

- How to effectively assist your client in the first days after receiving an ERISA claim or lawsuit
- What to tell clients about the expected burdens of ERISA discovery after *Glenn*, with an emphasis on strategies for resisting and defeating such discovery
- How in-house counsel can effectively approach and counsel business clients regarding the new playing field of discovery in ERISA cases, including electronic discovery implications
- New developments in and a survey of case law regarding conflict and other extra-record discovery requests since *Glenn*, and lessons to be learned

The State Bar of California has approved this webcast for CLE credit. Please visit www.dri.org for accreditation in your state and links to all state bar associations.

Wednesday, May 20, 2009

- 2:30 p.m. – 4:00 p.m. Eastern
- 1:30 p.m. – 3:00 p.m. Central
- 12:30 p.m. – 2:00 p.m. Mountain
- 11:30 a.m. – 1:00 p.m. Pacific

Web Cast Program Chair: Jonathan M. Fordin, Shutts & Bowen LLP, Miami, Florida



Sue A. Sperry is litigation counsel for Assurant Employee Benefits in Kansas City, Missouri, and current vice chair of the DRI Life, Health and Disability Committee In-House Counsel Subcommittee. Ms. Sperry has an extensive background in ERISA litigation and counseling clients regarding extra-record discovery requests, both before and after *Glenn*.



Richard N. Bien is a partner with Lathrop & Gage LLP in Kansas City, Missouri, and a long-time DRI Life, Health and Disability Committee member. Mr. Bien has been active in the ongoing battle against extra-record discovery since *Glenn*, and he has a wealth of experience counseling clients and litigating ERISA benefits claims.



Hisham Amin is a senior associate at The Groom Law Group in Washington, D.C., and current co-vice chair of the DRI Life, Health and Disability Membership Subcommittee. Mr. Amin is involved in several ongoing discovery disputes regarding post-*Glenn* extra-record requests and will share his practical experience and advice for opposing and defeating these discovery requests.

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