Fireman was not fully integrated into the Epiq goal setting process for 2023. The goals pertaining to my role as our Managing Director, Applied Artificial Intelligence were not fully articulated when I moved into that role, in large part to allow us to take a more organic approach to the role. During the last few months, as discussed with my manager, Eric Crawley, we have viewed my work in several ways. I will, therefore, summarize through that lens.

**Provide Thought Leadership and Promote Epiq as a Leader in Legal Industry AI and Innovation Space.**

I worked closely with Joshua Fireman to write a chapter for a treatise recently published by the Practicing Law Institute (PLI) “Knowledge Management & Innovation: A Manual for Law Firms and Other Legal Services Organizations. My name and Epiq role are listed in promotional material for the treatise.

I was interviewed by Legal Technology Hub in September and given an opportunity to provide our perspective on a range of generative artificial intelligence focused topics germane to the legal industry. The interview was published by Legal Technology Hub and well received.

I gave an in-person presentation on generative artificial intelligence and what it means for merger and acquisition attorneys to the M&A Technology Subcommittee of the America Bar Association Business Law Section in September. I have addressed this subcommittee in the past and have a standing invitation to speak at their meetings. One of the co-chairs has expressed preliminary interest in exploring using Epiq for M&A diligence services largely due to my interaction with him at the September 2023 meeting. Epiq promoted my appearance.

I wrote an article for Law 360 on the impact of generative AI for corporate legal departments. In the end, we decided not to publish the article there, but we are on course to have a revised version of the same published by Reuters PLC in early 2024.

I was a panelist at for an ILTA webinar recorded in October 2023 focusing on how to incorporate generative artificial intelligence into the practice of law. I was invited to participate by a client who met me when I was asked to support an Epiq pitch. Epiq promoted my appearance.

I wrote a blog for Zuva, a legal AI company founded by Noah Waisberg (a pioneer in the legal AI space), pertaining to the application of innovative technology by law firms. The blog was published in late November. Epiq promoted the blog.

I have been asked to participate in a series of panels hosted by ILTA in mid-December. My co-panelists include a collection of very well-regarded participants in our space. Epiq will promote the event.

I am slated to participate in a Legal Week panel in early 2024.

I am slated to participate in a panel hosted by the Association of Corporate Counsel in early 2024.

**AI Strategy Development**

I am an active participant in the development of our artificial intelligence strategy. I attend most meetings and share my perspective as a technical expert, a seasoned attorney with meaningful law firm and corporate legal department experience and as someone who built a knowledge management department inside a law firm.

**Support Strategic Relationships Related to Our AI Efforts**

I work with Doug Mazlish and others inside Epiq as warranted to further identify, structure, and support strategic relationships with third parties that can facilitate our artificial intelligence and data-focused efforts. In addition to being part of the team working with Microsoft and AWS, I have been especially focused on developing a relationship with 273 ventures (Dan Katz and Michael Bommarito) and Zuva (Noah Waisberg) as well as extending a Fireman relationship with Thomson Reuters dealing with API-delivered data so that it will benefit Epiq LS more broadly.

**Technical Sales Support**

I am called upon with increasing frequency to join our sales teams in our discussions with law firm and corporate legal department clients where it is useful to describe our overall AI initiatives and to project confidence and competence in the space. I note that these discussions can come up in on the traditional Epiq side of the house as well as through Fireman. A non-exhaustive list includes Kirkland and Ellis, Proskauer Rose, Morrison Forster, Hogen Lovells, NYC Law Department, Beigene and Frontier. I addressed a group of clients invited to a generative artificial intelligence focused event Epiq held in connection with Relativity Fest in Chicago and will participate in a similar client event we will host in New York in mid-December.

**Internal Technical Resource**

I have been actively involved with the team developing our AI platform. I participate in daily meetings and when appropriate serve as an individual contributor on technical matters. I have been responsible for several key elements that underpin the new ePiq discovery summarization capability and work closely with Greg Bodine, Shubhakant Satapathy, Joe Campbell and Eric Anderson, among others, as we make key architectural decisions related to our various generative artificial intelligence product initiatives. I am a very active participant in our conversations with the product management team. By virtue of my background and current academic focus I am at times best placed to perform certain leading-edge exercises or to serve as a partner to others inside Epiq who will be addressing certain technical issues. As our team grows, I hope to contribute in this space in more of an oversite capacity as opposed to being hands-on.