

Fortress Legal Asset Collateral Management Platform Case Study

Objective: to compile, clean, and standardize case level data from historical tapes and reports of Law Firm 1 to the Fortress Master Tape. We anticipate this to be an iterative process so please flag if you encounter any questions/difficulties.

Background: Law Firm 1 has a loan facility with Fortress where we lend against the Projected Contingency Fee Amount (“**PFA**”) of cases retained by Law Firm 1.

Instructions:

- 1) Law Firm 1’s case level data is saved under the Box folder “Case Tape”. Fees received by Law Firm 1 are saved under the Box folder “Sweep”
- 2) See excel Fortress Master Tape tab “Mapping” for the rules of standardization. We have outlined the rules based on excel “LawFirm1_Fortress_MassTort_inventory_020223”
- 3) Apply the rules on all the tabs and all the files in the Box folders. Compile the Fortress Master Tape by filing data under the data fields listed in Column B of excel Fortress Master Tape tab “Mapping”
- 4) Please note that some of the tapes in “Case Type” may have a different format/layout as excel “LawFirm1_Fortress_MassTort_inventory_020223” but it should be straightforward to compile. If you have any questions, please ask
- 5) Please also put together an issue list to flag any gaps, inconsistencies, incomplete data, errors, and questions
- 6) There are data entries that have not been categorized in the dropdown list. In the meantime, please summarize them for our review
- 7) You will also notice columns that do not correspond to the data fields listed in Column B of excel Fortress Master Tape tab “Mapping”. Please flag those columns and describe them for our review
- 8) Using the Master Tape that you compiled, please provide the analytics below in a time series fashion. If you are not able to do that, please detail the information that you need to do so:
 - a. The number of cases, by case types, that Law Firm 1 have over time
 - b. The number of cases, by case types, that were closed each month
 - c. The fee that Law Firm 1 receive and number of case paid, by case types, each month
 - d. Any analytics you deem helpful