

# VITA

## Ward Brian Zimmerman, Ph.D. MBA CSSC AVA

### OBJECTIVE

Provide professional, scientific, economic, and financial expertise to help settle litigation with greater speed and fairness.

### QUALIFICATIONS

Twenty-four years serving the legal community with over 2000 economic reports in 44 states. Qualified in State, Federal, and Admiralty Court. Worked on a pro-bono basis for the September 11<sup>th</sup> Victims Compensation Fund. Cognizant of the importance of instruction, research, and public service. Nine years teaching, two years as a full professor plus seventeen years experience at the senior executive level in higher education. Strong leadership, teaching, public speaking, and communication skills. Competence in analysis and design of complex information and financial systems. Extremely effective in the education of the time value of money and loss of financial resources. Licensed: Life, Health, Property and Liability Agent.

### EDUCATION

**Ph.D.**, Doctor of Philosophy, Educational Policy and Administration

*University of Kansas, May 18, 1986*

**Doctoral Dissertation:** Pecuniary Appraisal of Individual's Lifetime Earnings Considering Historical Growth Rates at Different Levels of Education.

**M.B.A.**, Master of Business Administration, Finance, 60-Hour Master's *University of Kansas, Graduated December 21, 1975, Degree Awarded May 24, 1976*

**B.A.**, Bachelor of Arts, Economics;

**B.A.**, Bachelor of Arts, Political Science *University of Kansas, May 20, 1974*

### PROFESSIONAL EXPERIENCE

#### **President & CEO**

*EnterpriZ Economic Consulting LLC, July 1, 1996 to Present*

Provide pecuniary analysis of lifetime earnings for economic reports, business loss reports, depositions, and courtroom testimony. Provide structured settlement services and consulting. Expert in lifetime earnings analysis and future financial needs. Capital budgeting. State, Federal, and private financial analysis.

**Professor, Department of Leadership and Educational Studies**

*Appalachian State University, July 1, 1994 to June 30, 1996*

Taught graduate level course in public finance, personnel, and leadership. Conducted research in the areas of telecommunications, interactive video and electronic data processing, administrative employment practices, and the economic value of education.

**Vice Chancellor for Business Affairs**

*Appalachian State University, July 1, 1990 to June 30, 1994*

Oversaw the operations of Financial Management and University Administration including: Accounting, Budgeting, Purchasing, Administrative Services, Strategic Planning, Physical Plant Operations, Auxiliary Services, Information Technology Services, Audits, Traffic and Public Safety and New River Light and Power Company. Served as liaison with official State agencies and the Legislature.

**Executive Vice President**

*Murray State University, August 1, 1989 to June 30, 1990*

Assumed the role of President of Murray State University in her absence.

**Vice President for Finance and Administrative Services**

*Murray State University, July 1, 1988 to June 30, 1990*

Oversaw the operations of Accounting, Budget, Payroll, Information Systems, Telecommunications, Personnel, Purchasing, Inventory Control, Administrative Services, Public Safety, and Physical Plant.

**Director of the Budget**

*University of Kansas, July 1, 1976 to June 30, 1988*

Exercised signature authority over all financial transactions. Led the in-house development of the real-time financial management system for the Lawrence and Kansas City Medical Center campuses. Prepared, supervised, and controlled a university operating budget in excess of 212 million dollars. Prepared salary, wage and fringe benefits projections for all university employees that led to funding requests to the Board of Regents, the Division of the Budget, the Governor and the Legislature. Prepared program justification required for budget presentation. Prepared periodic budgetary forecasts and opening entries for the accounting and payroll systems. Annually prepared the University's capital budget. Prepared capital bond offerings.

**Marketing Representative**

*IBM Corporation, 1975 to June 30, 1976*

Systems, financial and organizational analysis of small businesses.

**TEACHING EXPERIENCE**

**Continuing Legal Education (CLE)**

*November 1999 to Present, 36 Classes, NC, SC, KS, MA, D.C.*

North Carolina Association of Defense Attorneys & North Carolina Advocates for Justice; Trial Tips from the Trenches Seminar May 8<sup>th</sup>, 2009

Economic issues in: Auto Cases, Disbursements, Structured Settlements, etc.

Ethical and Professional Issues Surrounding Technology, Commissions, etc. (Ethics) U.S. Supreme Court Review 1998/1999

### **Continuing Insurance Education (CIE)**

March 2005 and March 2006, D.C.

Broker Commission Rebate Scandal- The Gray Market

### **U.S. Department of State**

February 2009, University of Dohuk; University of Kurdistan; University of Salahaddin; University of Sulaimani, Iraq.

Instructor/Advisor; Capacity Building for Higher Education in Kurdistan; Iraq.

### **Professor of Leadership and Educational Studies**

Appalachian State University, July 1, 1994 to August 18, 1996

Personnel Administration in Education, LHE 6300 (Summer '96, '95; Spring '96, '95)

College of Finance and Personnel Administration, LHE 5840 (Summer '96; Spring '96, '95)

Seminar on Community and Technical Colleges, LHE 4970 (Spring '96; Fall '95, '94)

School Finance, LHE 6180 (Fall '95)

Higher Education Internship, LHE 6900 (Fall '95; Summer '95)

Insights to Leadership in Teaching, C&I 3540 (Fall '95; Co-taught with Dr. Sara Zimmerman)

### **Associate Professor of Finance, Insurance & Real Estate**

Appalachian State University, July 1, 1990 to July 31, 1994

Insights to Leadership in Teaching C&I 3540 (Fall '93; Co-taught with Dr. Sara Zimmerman)

Introduction to Finance, FIR 3680 (Fall '92; Spring '91)

### **Associate Professor of Business and Public Affairs**

Murray State University, July 1, 1988 to June 30, 1990

Principles of Finance, FIN 330 (Spring '89; Fall '89)

### **University of Kansas, Spring 1986**

Seminar in Organization and Administration of Higher Education, EPA 998 (Spring '85; Co-taught with Chancellor Gene Budig)

## **REFERRED PUBLICATIONS**

Zimmerman, W., Hodges, M. Economic Issues in Auto Cases. *Kansas Trial Lawyers Association: Recognizing Issues, Attitudes and Damages in Automobile Litigation Seminar*, June 2003; Perception and Persuasion in a New World, December 2003; Best of CLE Live, June 2004.

Zimmerman, W., Booth, K. Structured Settlements Offer Tax and Other Advantages. *North Carolina Lawyers Weekly (non-refereed)*. Featured Article, March 3, 2003.

Zimmerman, W. Contrasts and Similarities of a Business v. an Individual's Valuation: Litigation Support. *The Valuation Examiner*. Feature Article, September/October 2002.

Zimmerman, W., Zimmerman, S., & Wark, A. Using the Internet: Enhancing the Secondary English Curriculum. *International Conference on Technology and Education Annual Proceedings*, 1999.

Zimmerman, S., Zimmerman, W., & Wark, A. Thoughts on Technology Training: Creating Collaborative Learning Environments. *International Conference on Technology and Education Annual Proceedings*, 1999.

Zimmerman, W., Ward, A., & Zimmerman, S., Examining Staff Development in Technology: A Descriptive Study. *International Conference on Technology and Education Annual Proceedings*, 1999.

Zimmerman, W., Proving the Time Value of Money to a Jury: What it Means to Your Client. *The Automobile and Personal Injury Case, Kansas Trial Lawyers Association Proceedings*, 1998.

Zimmerman, W., Zimmerman, S., Enhancing Earth Science Concepts Through the Use of Computer-Mediated Communication. *The 15th International Conference on Technology and Education, Annual Proceedings*, 1998.

Zimmerman, W., Zimmerman, S., Technology Curriculums: An Analysis of What is State Mandated. *The 13th International Conference on Technology and Education, Annual Proceedings*, 1996.

Zimmerman, S., Zimmerman, W., Assessing the Use of the Internet. *The 13<sup>th</sup> International Conference on Technology and Education, Annual Proceedings*, 1996.

Zimmerman, S., Zimmerman, W., Technology Assisted Educational Materials and Curriculum Development. *Society for Information Technology and Teacher Education*, Allyn & Bacon, 1996.

Zimmerman, S., Zimmerman, W., Capen, M., Blanton, W., A Look at Communication Patterns on the MariMUSE: Understanding How Children Learn. *Technology and Teacher Education Annual*, Allyn & Bacon, 1995.

Zimmerman, W. A., Zimmerman, S., Zimmerman, W. B., State Technology Curriculums: A National Survey. *Technology and Teacher Education Annual*, Allyn & Bacon, 1995.

Zimmerman, S., Zimmerman, W., Capen, M., Blanton, W., Exploring the Use of the MUSE in a Social Cultural Activity Learning Environment. *International Conference on Technology and Education, Annual Proceedings*, 1995.

Zimmerman, W., Zimmerman, S., Blanton, W., MUSE: Implementation of a Virtual Community into the Fifth Dimension. *International Conference on Technology and Education, Annual Proceedings*, 1995.

Zimmerman, W., Howe, R., Salary-Trend Study of Faculty in Business Marketing and Marketing Management for the Years 1989-90 and 1992-93. *Resources in Education, Washington D.C., Education Clearing House, Georgetown University*, March 1994 ED 362 131.

## REFEREED PRESENTATIONS

Fallout from the Broker Commission Rebate Scandals Society of Settlement Planners (SSP), Washington D.C., March 2005. Using the Internet: Enhancing the Secondary English Curriculum. International Conference on Technology and Education Annual Proceedings, Tampa, Florida, October 1999.

Thoughts on Technology Training: Creating Collaborative Learning Environments. International Conference on Technology and Education Annual Proceedings, Tampa, Florida, October 1999.

Examining Staff Development in Technology: A Descriptive Study. International Conference on Technology and Education, Edinburgh, Scotland, March 1999.

Transforming Teacher Preparation to Ensure Learning. Southeast Regional Association of Teacher Educators, Nassau, Bahamas, November 1998.

A Survey of State Technology Curriculums. Southeast Regional Association of Teacher Educators, Norfolk, Virginia, November 1997.

Surveying State Technology Curriculums: The Gateway to Education's Future.

Association of Teacher Education, Washington D.C., February 1997. Technology Curriculums: An Analysis of What is State Mandated. International Conference on Technology and Education, New Orleans, Louisiana, USA, March 1996.

Technology Assisted Educational Materials and Curriculum Development. Society for Information Technology and Teacher Education, Phoenix, Arizona, March 1996.

Comparing State Technology Curriculums: A National Survey. American Association for Teaching and Curriculum, Atlanta, Georgia, October 1995. (Prepared presentations for colleagues unable to attend)

The Value of a College Education: A Pecuniary Analysis. American Education Research Association, San Francisco, California, April 1995.

The Impact of Technology on Students with Exceptionalities: Lessons for Inclusion. American Educational Research Association, San Francisco, California, April 1995.

Exploring the Use of the MUSE in a Social Cultural Activity Learning Environment. International Conference on Technology and Education, Orlando, Florida, USA, March 1995.

MUSE: Implementation of a Virtual Community into the Fifth Dimension. International Conference on Technology and Education, Orlando, Florida, USA, March 1995.

A Virtual Educational Community: Students Who Learn and Play. Eastern Educational Research Association Annual Conference, Hilton Head, South Carolina, March 1995.

An Examination of Communication Patterns Among Children Using The MariMUSE. Eastern Educational Research Association Annual Conference, Hilton Head, South Carolina, March 1995.

A National Survey of Technology Curriculums. Eastern Educational Research Association Annual Conference, Hilton Head, South Carolina, March 1995.

Children's Interaction on the MariMUSE: A Look at Communication Patterns. Society for Information Technology and Teacher Education, San Antonio, Texas, March 1995.

State Technology Curriculums: A National Survey. Society for Information Technology and Teacher Education, San Antonio, Texas, March 1995.

The Impact of Technology on the Problem Solving Abilities of Students Academically At-Risk. International Conference on Technology and Education, London, England, March 1994.

## **KEYNOTE SPEAKER**

How Do You Deal With Ethical and Other Issues as an Annuity Professional?, Moderator of a Panel of Three Experienced Practitioners, Society of Settlement Planners Annual Meeting and Seminar, Washington, DC, March 5-7, 2008

How to Build and Manage a Premier Forensic Consulting Practice. SEAK, Hyannis, Cape Cod, Massachusetts, June 21, 2007.

Economic Issues in Auto Cases: Recognizing Issues, Attitudes and Damages in Automobile Litigation Seminar. Kansas Trial Lawyers Association (KTLA), Topeka, Kansas, June 2003.

Proving the Time Value of Money to a Jury: What it Means to Your Client. (KTLA), Emporia, Kansas, September 1998.

The Excitement of Economic Analysis. St. Louis Association of Hospital Risk Managers (SLAHRM), St. Louis, Missouri, February 1998.

Preparing for a University Site Accreditation Visit. North Carolina Assembly of Chief Financial Officers, October 18-19, 1993.

The Fundamentals of Debt Financing: What All University Administrators Need to Know. North Carolina Housing Officers, October 13-15, 1993.

Enriching the Educational Environment. Odyssey of the Mind, May 1992.

## PROFESSIONAL ACTIVITY & SERVICE

National Association of Certified Valuation Analysts (NACVA) \*

National Association of Forensic Economics (NAFE) \*

National Structured Settlements Trade Association (NSSTA) \*

Charter Associate Member of the American Bar Association (ABA): Law Practice Management Section \*

Charter Member of the Society of Settlement Planners (SSP) \*

Board of Directors, National Association of Certified Valuation Analysts (NACVA) - Valuation Education & Credentialing Board, elected 2002-04

American Educational Research Association (AERA)

Advocate Software, PC-Economist Series Consultant

Society for Information Technology and Teacher Education (SITE)

Association for the Advancement of Computing in Education (AACE)

Who's Who In Executives & Professionals and Who's Who In Higher Education

Appalachian State University Research Council, Elected 1996-98

Departmental Personnel Committee (DPC) The Department of Leadership and Educational Services (LES), Elected 1994-96

National Association of College and University Business Officers (NACUBO)

Southern Association of College and University Business Officers (SACUBO)

Society for College and University Planning (SCUP)

North Carolina Treasurer's Equity Investment Advisory Committee

Board of Directors, Appalachian Foundation, Inc.

Board of Directors, Appalachian Endowment Corporation

Treasurer and Board of Directors, Appalachian Brian Estates

North Carolina Assembly of Chief Financial Officers

Central Association of College and University Business Officers (CACUBO)

EDUCOM

Phi Delta Kappa

Murray State University SACS Accreditation Self-Study & Strategic Planning Committee

Commonwealth of Kentucky University Business Administrators Group (UBAG); Task Group for Inter-institutional Finance (TGIF); and Task Group for Capital Construction (TGCC)

University of Kansas Budget and Finance Group; Informational Systems Advisory Committee; Price Index Committee; Supervisory Board of the Credit Union; and Pearson Trust Enrichment Committee

Big Eight Business Officers

Kansas Council of Business Officers

Jayhawk Innovative Software Users Group, Founding President

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\* Active Member

## TRAINING

National Association of Certified Valuation Analysts (NACVA) Fifteenth Annual Consultants' Conference - "Rising to the Top of Your Game in Valuation and Financial Forensics," June 8-11, 2008, Las Vegas, Nevada.

Summit Settlement Services Annual Meeting, June 4-7, 2008, Phoenix, Arizona.

SSP Annual Meeting, March 5-7, 2008, Washington, D.C.

American Association of Nurse Life Care Planners, exhibitor/sponsor, September 20-23, 2006, Nashville, Tennessee.

NACVA Twelfth Annual Consultants' Conference - "Valuation, Litigation, and Fraud Deterrence – Practical, Theoretical, and Academic Perspectives," June 1-4, 2005, Philadelphia, Pennsylvania.

SSP Annual Meeting, March 1-4, 2005, Washington, D.C.

SSP Annual Meeting, March 10-12, 2004, Phoenix, Arizona.

The International Conference on Life Care Planning, exhibitor/sponsor, October 10-12, 2003, Dallas, Texas.

Summit Settlement Services Annual Meeting, October 2-5, 2003, Phoenix, Arizona.

NACVA Tenth Annual Business Valuation Conference – "Business Valuation: A Decade of Development—Foundation for the Future," May 28-31, 2003, New York, New York.

SSP Annual Meeting, January 22-24, 2003, Dallas, Texas.

NACVA Ninth Annual Business Valuation Conference – "The Valuator's Role – Your Future and the New Economy," May 22-25, 2002, San Diego, California.

Accredited Valuation Analyst (AVA)<sup>1</sup> certification conferred by the National Association of Certified Valuation Analysts (NACVA), February 27, 2002, Salt Lake City, Utah.

Structured Settlements University GE<sup>2</sup>, September 27-30, 2001, Lynchburg, Virginia.

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<sup>1</sup> AVA certification consists of: 5-day comprehensive training, New Orleans, Louisiana, October 29-November 3, 2001; 4-hour proctored certification examination; & completion of 40+ hour standardized case study.

<sup>2</sup> General Electric Capital Assurance Company, First Colony Life Insurance Company, American Mayflower Life Insurance Company of New York, & GE Capital Life Insurance Company of New York.

Insurance Pre-licensing: Life and Health (40 Hours) Certified Training Inc., November 5-13, 2000, Charlotte, North Carolina; Property and Casualty (40 Hours) Caldwell Community College, October 23-31, 2000, Hudson, North Carolina.

National Structured Settlement Trade Association (NSSTA) Annual Conference, April 9-12, 2000, Williamsburg, Virginia.

Certified Structured Settlement Consultant (CSSC)<sup>3</sup> professional designation conferred by the National Structured Settlement Trade Association (NSSTA), in association with the University of Notre Dame, September 22-26, 1999, South Bend, Indiana.

Forensic Practice, June 16, 1999, Hyannis, Cape Cod, Massachusetts.

National Expert Witness & Litigation Seminar (8th Annual), June 17-18, 1999, Hyannis, Cape Cod, Massachusetts.

NSSTA Eastern Regional Membership Meeting, October 29-31, 1997, Washington, D.C.

National Association of College and University Business Officers-Marriott Executive Leadership Conferences I & II, January 31 - February 5, 1992 and March 12-17, 1993, Point Verde & Sawgrass, Florida.

Re-Shaping the Business of Higher Education Conference, July 15-18, 1992, Washington, D.C.

IBM's Organizing Information Systems, September 12-15, 1989, Kansas City, Missouri.

## **PERSONAL**

Married to: Sara Jane Zimmerman, Ph.D.

Professor and former Chair of the Department of Curriculum & Instruction, *Appalachian State University*

Children: Ward Alexander, Brian Nathaniel, Zachary Skywarrior, Elizabeth Briana Jane

Interests: time value of money, human economic capital, teaching, faculty governance, higher education, reading, religion, relative and quantum physics, astronomy, SCUBA diving, cooking, painting, photography, gardening, and aviation.

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<sup>3</sup> One of the first 200 professionals to earn the CSSC designation since its 1992 inception. More than seventy-five hours of combined study and course work culminating with an intense comprehensive examination.