



**SOQ No. 25-006**

**Supplemental Legal Services**

**Submission Deadline: February 20, 2025 at 3:30 PM**

**ATTENTION VENDORS!!!**

**Please review all pages and respond accordingly, complying with all provisions in the public notice and Jefferson Parish Code of Ordinances Section 2-926 et seq. All submissions must be received on the Purchasing Department's e-Procurement site, [www.jeffparishbids.net](http://www.jeffparishbids.net), by the SOQ submission deadline date and time. Late submissions will not be accepted.**

**Jefferson Parish Purchasing Department  
General Government Building  
200 Derbigny Street, Suite 4400  
Gretna, LA 70053  
Mark BATTERY  
Mark.BATTERY@[jeffparish.gov](mailto:jeffparish.gov)  
(504)-364-2810**

**PUBLIC NOTICE**  
**SOQ 25-006**

**Supplemental Legal Services**

The Parish of Jefferson, authorized by **Resolution No. 145683** is hereby soliciting a Statement of Qualifications (**Professional Legal Services Questionnaire**) from persons or firms interested in providing various professional legal services.

**Deadline for Submissions: 3:30 p.m., February 20, 2025**

The following criteria, listed in order of importance, will be used to evaluate the statement of the firms submitting, with only those persons and/or firms receiving an overall cumulative score of at least seventy (70) percent or greater, of the total possible points for all categories to be assigned by the participating legal services evaluation committee members shall be deemed qualified to perform outside legal services tasks:

- (1) Professional training and experience in relation to the type of work required for the outside legal services. (Maximum points awarded shall be thirty-five (35).)
- (2) Size of firm and capacity for timely completion of newly assigned work considering the number of professional and support personnel required to perform the type of outside legal service tasks and the firm's current unfinished workload. (Maximum points awarded shall be thirty (30).)
- (3) Past performance by person or firm on parish contracts. Assertions of fault by a person or firm, which shall include time delays, cost over-runs, and/or malfeasance in prior work completed for the parish shall be evidenced by substantiating documentation provided by the parish attorney and received by the chairman of the evaluation committee a minimum of two (2) weeks prior to the scheduled date of the legal services evaluation committee meeting. (Maximum points awarded shall be ten (10).)
- (4) Location of the principal office where work will be performed. Preference shall be given to persons or firms with a principal business office at which the work will be performed as follows: (1) Jefferson Parish, including municipalities located within Jefferson Parish (15 points); (2) Neighboring Parishes of the Greater New Orleans Metropolitan Region, which includes Orleans, Plaquemines, St. Bernard, St. Charles and St. Tammany Parishes (12 points); (3) Parishes other the foregoing (ten (10) points); (4) outside the State of Louisiana (six (6) points). Maximum points awarded shall be fifteen (15).)
- (5) Adversarial legal proceedings between the parish and the person or firm performing professional services, in which the parish prevailed, and excluding those instances or cases where the person or firm was added as an indispensable party, or where the person or firm participated in or assisted the public entity in prosecution of its claim. In the event that the person or firm fails to provide accurate and detailed information regarding legal proceedings with the parish, including the absence of legal proceedings, the person or firm shall be deemed unresponsive with regard to this category, and zero (0) points shall be awarded. (Maximum points awarded shall be fifteen (15) for the lack of any such adversarial proceedings as defined.)
- (6) Prior successful completion of projects of the type and nature of legal

All persons and/or firms must submit a Statement of Qualifications (Jefferson Parish Professional Legal Services Questionnaire) by clicking on "Business with the Parish" under Business Services, and then clicking on "Professional Legal Services Questionnaire", and submit a Statement of Qualifications (Professional Legal Services Questionnaire) for each sub-consultant firm or individual. (Refer to Jefferson Parish code Ordinance, Section 2-928).

Submissions are to be submitted on the eProcurement site at [www.jeffparishbids.net](http://www.jeffparishbids.net).

Those submissions will only be accepted electronically via the Parish's eProcurement system, Central Bidding. Central Bidding can be accessed by visiting either [www.centrauctionhouse.com](http://www.centrauctionhouse.com) or [www.jeffparishbids.net](http://www.jeffparishbids.net). All vendors will be required to register with Central Bidding. Jefferson Parish vendors are able to register for free by accessing the following link: [www.centralacutionhouse.com/registration](http://www.centralacutionhouse.com/registration).

No submittals will be accepted after the deadline.

Affidavits are not required to be submitted with the Statement of Qualifications, but shall be submitted prior to contract approval.

Insurances are not required to be submitted with the Statement of Qualifications, but shall be submitted prior to contract approval.

Disputes/protests relating to the decisions by the evaluation committee or by the Jefferson Parish Council shall be brought before the 24<sup>th</sup> Judicial District Court.

**ADV: The New Orleans Advocate: February 5, and 12, 2025**



## **Professional Legal Services Questionnaire Instructions**

- The Professional Legal Services Questionnaire shall be used for outside legal services.
- **The Professional Legal Services Questionnaire should be completely filled out. Complete and attach ALL sections. Insert “N/A” or “None” if a section does not apply or if there is no information to provide.**
- Questionnaire must be signed by an authorized representative of the Firm. Failure to sign the questionnaire shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- All subcontractors must be listed in the appropriate section of the Questionnaire. Each subcontractor must provide a complete copy of the Professional Legal Services Questionnaire, applicable licenses, and any other information required by the advertisement. Failure to provide the subcontractors' complete questionnaire(s), applicable licenses, and any other information required by the advertisement shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- If additional pages are needed, attach them to the questionnaire and include all applicable information that is required by the questionnaire.



## Professional Legal Services Questionnaire

**A. Person or Firm Name & Principal Address:**

Taggart Morton, LLC  
1100 Poydras Street  
Suite 2100  
New Orleans, LA 70163

**B. Name, Title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, who is licensed to practice law in the State of Louisiana with a minimum of five (5) years' experience:**

Jennifer R. Herbert  
Taggart Morton, LLC  
1100 Poydras Street  
Suite 2100  
New Orleans, LA 70163

**C. Location of the principal:**

1100 Poydras Street  
Suite 2100  
New Orleans, LA 70163

**D. Please check the legal field or fields in which Firm is qualified to perform services for Jefferson Parish and include the number of years of experience in that particular field.**

<input type="checkbox"/> Bond Services (Years: _____)	<input checked="" type="checkbox"/> Science & Technology Law (Years: _____)
<input type="checkbox"/> Elections (Years: _____)	<input checked="" type="checkbox"/> State & Local Government Law (Years: <u>44</u> )
<input checked="" type="checkbox"/> Administrative & Regulatory (Years: <u>46</u> )	<input type="checkbox"/> Taxation (Years: _____)
<input checked="" type="checkbox"/> Antitrust Law (Years: <u>46</u> )	<input checked="" type="checkbox"/> Tort Trial & Insurance Practices (Years: <u>51</u> )
<input checked="" type="checkbox"/> Business Law (Years: <u>43</u> )	<input checked="" type="checkbox"/> Complex Litigation (including asbestos litigation) (Years: <u>34</u> )
<input type="checkbox"/> Criminal Justice (Years: _____)	<input type="checkbox"/> Securities (Years: _____)
<input type="checkbox"/> Dispute Resolution (Years: _____)	<input checked="" type="checkbox"/> Ethics Law (Years: <u>44</u> )
<input checked="" type="checkbox"/> Environmental, Energy & Resources (Years: _____)	<input type="checkbox"/> Civil Service Matters (Years: _____)
<input checked="" type="checkbox"/> Health Law (Years: <u>46</u> )	<input checked="" type="checkbox"/> Civil Rights & the Constitution (Years: _____)
<input checked="" type="checkbox"/> Intellectual Property (Years: <u>46</u> )	<input type="checkbox"/> Municipal Representation (including liability & intergovernmental conflicts) (Years: _____)
<input type="checkbox"/> International Law (Years: _____)	<input type="checkbox"/> Code Enforcement Matters (Years: _____)
<input checked="" type="checkbox"/> Labor & Employment Law (Years: <u>20</u> )	
<input checked="" type="checkbox"/> Public Contract Law (Years: <u>20</u> )	

## Professional Legal Services Questionnaire

<input checked="" type="checkbox"/> Public Utilities Law (Years: <u>44</u> ) <input checked="" type="checkbox"/> Communications Law (Years: <u>46</u> ) <input checked="" type="checkbox"/> Transportation Law (Years: <u>41</u> ) <input checked="" type="checkbox"/> Property (Years: <u>42</u> ) <input checked="" type="checkbox"/> Trust & Estate Law (Years: <u>43</u> ) <input checked="" type="checkbox"/> Other/specific project as required by the advertisement (Years: <u>46</u> )	<input type="checkbox"/> Oil Spill Litigation (Years: _____ ) <input type="checkbox"/> Public Finance (Years: _____ ) <input checked="" type="checkbox"/> Land Use, Planning & Zoning Law (Years: <u>43</u> ) <input checked="" type="checkbox"/> Economic Development (Years: <u>43</u> ) <input checked="" type="checkbox"/> Construction Law (Years: <u>46</u> )
---	---

**E. List all subcontractors anticipated for this Project. Please note that all subcontractors must submit a fully completed copy of this questionnaire, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.**

Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1. None	N/A	N/A
2.		
3.		
4.		



## **Professional Legal Services Questionnaire**

### **F. Professional Training and experience in relation to the type of work required for the outside legal services.**

Taggart Morton is a New Orleans based, medium-sized law firm consisting of twelve attorneys who are all licensed in Louisiana with several also licensed in other states including Mississippi, Texas, Illinois and District of Columbia. Additionally, our firm is proud to have an internationally licensed attorney from Australia.

While small, Taggart Morton's practice provides almost fifty years of continuous experience in a variety of areas representing public and private entities, as well as individuals.

Taggart Morton's practice reflects the specialization of the firm's attorneys in regulated industries of all types, including public utilities, health care, technology, media and communications, transportation, and oil & gas. Drawing from this base of clients, together with its representation of numerous small businesses and property owners, Taggart Morton's practice embraces virtually every type of dispute, including commercial and business (including tax disputes), employment law, ERISA, tort and insurance defense (including products liability), antitrust and trade regulation, intellectual property, media/technology law, environmental and toxic tort, bankruptcy, workers' compensation, real estate, managed care, insurance regulatory services and construction.

Our litigators have appeared in all Louisiana State and federal courts, the U.S. Fifth Circuit Court of Appeal, the Louisiana Supreme Court, and the Office of Worker's Compensation. Members of this group have argued cases before the United States Supreme Court and have presented complaints and business review requests to the Department of Justice and the Federal Trade Commission.

Please see attached attorney profiles for further information.

### **G. Size of Firm and capacity for timely completion of newly assigned work considering the number of professional and support personnel required to perform the type of outside legal services tasks and the Firm's current unfinished workload.**

Our firm's total personnel consists of twelve attorneys; three paralegals/legal assistants; one receptionist; and one office manager. Because cases frequently include complex and overlapping issues, Taggart Morton's attorneys, with their specialized knowledge and experience in different practice areas, often combine their efforts to offer clients the most effective legal representation. A lead attorney charged with knowing the status of each matter and notifying the client of any significant developments heads each team. This approach permits Taggart Morton to task-orient our practice resulting in our clients receiving the best and most cost-effective representation.



## Professional Legal Services Questionnaire

i. Please specify the total number of support staff that may assist in the completion of a matter for each area of the law selected above: 2-5

ii. List any attorneys that may assist in the completion of a matter for each area of the law selected above. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's attorneys that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.

Name:	Legal Field:	Years of Experience in Legal Field:
1. A.J. Herbert III	Insurance Company Regulation; Licensing and Corporate Proceedings; Managed Care/Health Law; General Corporate and Business Law	36
2. Jennifer R. Herbert	Insurance Company Regulation; Public Contract and Procurement; Employment and Labor Law; Mergers and Acquisitions; Health Law; Corporate and Business Law	20
3. Barry H. Grodsky	Banking Law; Real Estate Law and Property Management; Bankruptcy Litigation	43
4. Charlton B. Ogden III	General Civil Litigation; Public Utility Law; Toxic Torts; Asbestos Litigation; Oil & Gas Law; Estate Planning	44
5. Donald J. Miester	Appellate Law; Complex Commercial Litigation	35

## Professional Legal Services Questionnaire

i. Please specify the total number of support staff that may assist in the completion of a matter for each area of the law selected above: \_\_\_\_\_

ii. List any attorneys that may assist in the completion of a matter for each area of the law selected above. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's attorneys that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.

Name:	Legal Field:	Years of Experience in Legal Field:
1. James R. Morton	Real Estate; Finance; Oil and Gas; Land Use; Zoning; Environmental; Civil Practice; Hotels; and Business Litigation	43
2. Jessica S. Ward	Health Care; Personal Injury; Entertainment and Media Law; Business Litigation and Commercial Transactions	7
3. Perry R. Staub	Antitrust and Trade Regulation; Health Care; Internet Law; Technology Law; Media Law; Communications Law; Business Litigation; Construction Litigation; Intellectual Property Litigation; Workers' Compensation	46
4. Kevin M. Wheeler	Admiralty and Maritime; Business; Commercial; Civil Rights and Constitutional; Consumer; Family; Franchising Law; Insurance; Personal Injury; Products Liability; Trusts and Estate Planning	39
5. Mark E. Van Horn	Health Care; Transportation; Products Liability; Toxic Torts and Insurance Coverage Litigation	41

## Professional Legal Services Questionnaire

i. Please specify the total number of support staff that may assist in the completion of a matter for each area of the law selected above: \_\_\_\_\_

ii. List any attorneys that may assist in the completion of a matter for each area of the law selected above. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's attorneys that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.

Name:	Legal Field:	Years of Experience in Legal Field:
1. Matthew S. Foster	Health Care; Personal Injury; Administrative Law; Business Litigation; Constitutional Law; Probate	9
2. Janet D. McGrew	Lemon Law; Workers' Compensation; Personal Injury Defense; Commercial litigation; Construction Litigation; Media Law	44
3.		
4.		
5.		



## Professional Legal Services Questionnaire

**H. Past performance by person or Firm on Parish contracts. Please attach additional pages if necessary.**

None.

**I. Adversarial legal proceedings between the Parish and the person or Firm performing professional services, in which the Parish prevailed, and excluding those instances or cases where the person or Firm was added as an indispensable party, or where the person or Firm participated in or assisted the public entity in prosecution of its claim. In the event that the person or Firm fails to provide accurate and detailed information regarding legal proceedings with the Parish, including the absence of legal proceedings, the person or firm shall be deemed unresponsive with regard to this category, and zero (0) points shall be awarded. Please attach additional pages if necessary.**

None.

## Professional Legal Services Questionnaire

**J. Prior successful completion of projects of the type and nature of legal services, as defined, for which Firm has provided verifiable references. (List no more than 10 projects.)**

**1.**

In re: Ormond Country Club  
Chapter 11 Case No. 10-10807  
United States Bankruptcy Court, Eastern District of Louisiana

Representation of JPMorgan Chase Bank as largest credit in successful workout of debtor's bankruptcy case and assistance in successful Chapter 11 plan.

Responsible Attorney(s): A.J. Herbert, Barry Grodsky and Jennifer Herbert

**2.**

Health Law - Serve as state regulatory counsel for national Medicaid MCO; represent hospital service districts in issues pertaining to HSD Law; ASC licensing issues; purchase of a hospital; purchase and licensing of a pharmacy; provider contracting; Medicaid supplemental payment programs

Responsible Attorney(s): A.J. Herbert, Jennifer Herbert and Mark Van Horn

**3.**

Representation of Jefferson Parish domiciled business in EEOC complaints and human resources compliance; provide legal advice and opinions on FLSA compliance issues.

Successfully defended Jefferson Parish employer Tiger Vision.

Responsible Attorney(s): Jennifer Herbert

**4.**

Boyce Innerarity v. The McCarty Corporation, et al., No. 2000-16627, Div. "N", CDC, Parish of Orleans, State of Louisiana - Client (Entergy New Orleans, Inc.)

Successfully defended ENOI at jury trial of contractor's employee, who alleged exposure to asbestos at ENOI's power plant caused his mesothelioma to a zero jury verdict.

Responsible Attorney(s): Charlton Ogden

**5.**

Preparation and submission of response to request for proposals on behalf of national insurance company and subsequent litigation of issues related to the contract aware process.

Represented an airport authority in a variety of matters, including regulatory compliance, litigation matters, concessions, public lease, open meetings, public records, public bid, FAA compliance, land acquisition, noise abatement, construction disputes, leases and airport development (air side and land side).

Responsible Attorney(s): A.J. Herbert and Jennifer Herbert

## Professional Legal Services Questionnaire

6.

Economic development - Represented the Committee of 100 this year in negotiating and finalizing the agreements for the procurement process and master contract for a statewide economic development plan.

Responsible Attorney(s): A.J. Herbert

7.

General Counsel for a state regulatory board, with responsibility for Open meetings Law, Public Bid law; Procurement Code; Public Records Act (LSBOE). Experienced in the prosecution and defense of public procurement protests and resulting litigation under the Procurement Code.

Responsible Attorney(s): A.J. Herbert, Jennifer Herbert and Mark Van Horn

8.

Tort Claims -

Donahue v. Republic Nat'l Distrib. Co., LLC  
Rodman v. Otsuka America Pharmaceutical, Inc.  
Jenkins v. Bristol-Myers Squibb

Responsible Attorney(s): Perry Staub, Mark Van Horn and Jessica Ward

9.

10.




## Professional Legal Services Questionnaire

**K. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.**

Taggart Morton is dedicated to providing its attorneys with the latest in computer resources and technologies. This helps us provide the quality of work normally associated with the largest firms. Our goal is always to offer our clients effective and comprehensive representation at a reasonable cost. The multi-talented attorneys at Taggart Morton have dedicated themselves to excellence in legal representation and counseling. Taggart Morton is "AV" rated by the Martindale-Hubbell Peer Review Ratings and is consistently named as one of the top law firms in the state of Louisiana. We operate under the simple principles of excellence, diligence, and perseverance - we have never varied from this benchmark taking pride in our professional abilities, dedication, and attention to our clients' interests. It is this level of service that we can offer to the various departments and agencies of the Jefferson Parish Government.

**L. To the best of my knowledge, the foregoing is an accurate statement of facts.**

Signature:  Print Name: Jennifer R. Herbert

Title: Attorney Date: 02/20/25

## **A. J. HERBERT, III**

**MEMBER**, *Taggart Morton, L.L.C. (2010-current)*

*(Licensed to practice in Louisiana and Texas)*

Chairman, Healthcare, Insurance Regulation and Corporate Law Department

### **EDUCATION**

Boston University School of Law, Boston, Massachusetts, 1990, LL.M. in American Banking Law, sum cum laude, Class Rank: 1/23

Tulane University School of Law, New Orleans, Louisiana, 1989, J.D., summa cum laude, Order of the Coif; Notes & Comments Editor, Tulane Law Review, Class Rank: 3/232

Loyola University, 1985, B.A., Political Science, magna cum laude

### **PROFESSIONAL AFFILIATIONS**

Chambers, Member

Louisiana Bar Association, Health Law and Corporate Law Sections

Texas Bar Association

American Health Lawyers Association

New Orleans Bar Association, Health Law Section (Chairman, 2013-14)

Louisiana Association of Health Plans, Regulatory Affairs Committee

### **EMPLOYMENT HISTORY**

Property Insurance Association of Louisiana (2014 to present)

Executive Director; responsible for \$5 million operating budget and management of 25+ employee organization which provides services to all 600+ fire insurers authorized to write fire insurance in the state of Louisiana.

Taggart Morton, L.L.C. (November, 2010 to present)

Chairman, Health Care, Insurance Regulation and Corporate Law Department.

Middleberg Riddle & Gianna (May 1984 to November, 2010)

Managing Director of the firm's Baton Rouge, Louisiana office and Chairman of the firm's Corporate and Health Care Department.

### **AREAS OF PRACTICE**

Insurance Company Regulation, Licensing and Corporate Proceedings

Managed Care/Health Care Law (including Medicare and Medicaid managed care)

General Corporate and Business Law

Mergers and Acquisitions

Public Procurement Law (including Public Bid Law and procurement disputes)

**COMMUNITY ACTIVITIES (FORMER AND CURRENT)**

Former Commissioner, City of Kenner Planning and Zoning Commissions

Former President, Lake Vista of Jefferson Civic Association

Fellow, Institute of Politics (Loyola University)

Graduate, Metropolitan Area Committee Leadership Forum

Past Treasurer, Leukemia Society, Louisiana Chapter

Former Member, Louisiana Healthcare Commission

Named in 2009 as one of the Top 50 Lawyers in New Orleans by CitiBusiness for achievements in the areas of healthcare and insurance regulatory law

Named in 2015 as a Top Lawyer for Health Care Law by New Orleans Magazine

Chairman, Health Law Committee, New Orleans Bar Association (2013-2014)

Finance Committee Member, Hide-Away Lake Community Board (2024-Present)



**JENNIFER WARDEN HERBERT**

1100 Poydras Street, Suite 2100

New Orleans, Louisiana 70163-2100

(504) 599-8503, (504) 250-5200(cell), [jherbert@taggartmorton.com](mailto:jherbert@taggartmorton.com)

*(Licensed to practice in Louisiana and Mississippi)*

---

**PROFESSIONAL EXPERIENCE**

---

**Taggart Morton, L.L.C., Attorney**

New Orleans, Louisiana (November 2010 – present)

**Middleberg Riddle & Gianna, Attorney**

New Orleans and Baton Rouge, Louisiana (February 2005 – November 2010)

---

**EDUCATION**

---

Loyola University School of Law, New Orleans, Louisiana

J.D. (Civil Law Division, Common Law Certificate), 2005, magna cum laude

Law Review, Order of Barristers, Moot Court (National Team)

Loyola University College of Business Administration, New Orleans, Louisiana

M.B.A., 2002, summa cum laude

Loyola University College of Music, New Orleans, Louisiana

B.M., B.A., 2000, magna cum laude

---

**AREAS OF PRACTICE**

---

Corporate and Business Law

Public Contract and Procurement

Health Law (including Medicare, Medicaid and Managed Care)

Employment and Labor Law

Mergers and Acquisitions

Appellate Litigation

Insurance Company Regulation

---

**PROFESSIONAL AFFILIATIONS**

---

Louisiana State Bar Association, Health Law and Corporate Law Sections

Mississippi Bar Association

American Health Lawyers Association

New Orleans Bar Association, Business and Health Law Sections

Elite Lawyer by *Inside New Orleans* (2022)

---

## **COMMUNITY ACTIVITIES (CURRENT AND FORMER)**

---

Lakefront Management Authority, Commissioner

Lake Vista Property Owners Association, Past Treasurer

Lake Vista Garden Club, Past President

---

## **PRESENTATIONS**

---

“What Health Care Reform Means for You”

New Orleans Paralegal Association, May 2012

“The Health Care Market Reform’s Coverage Mandates”

CLE for Lorman Education Services, May 2011

“Understanding the Impact of Health Care Reform on Employers”

New Orleans Bar Association, April 2011

“Health Care Reform: Overview and Coverage Mandates, Grandfathered Plans

Federal Bar Association, February 2011

“Federal Health Care Reform: Impact on Your Group Health Plan”

Federal Bar Association, February 2011

“Issues with Health Care Law and Reform: A Panel Discussion”

Federal Bar Association, September 2010

“An Overview of Managed Care”

Louisiana State University Health Sciences Center, March 2010

“Drafting and Responding to Discovery Requests”

CLE by Half Moon Seminars, June 2008

**Barry H. Grodsky**  
**[bgrodsky@taggartmorton.com](mailto:bgrodsky@taggartmorton.com)**  
**(504) 599-8535**

Barry has practiced in the area of banking law, real estate law and property management over the past 30 years and has represented national, regional and local financial institutions in a wide variety of matters. Barry received his business degree from the University of Texas in 1979 and his law degree from Tulane University in 1982. Barry served internships with United States Congressman Billy Tauzin and United States District Judge Morey Sear and after serving a judicial clerkship for Judge Steven Plotkin, his practice has been focused primarily on representing financial institutions.

Barry specifically represents financial institutions in the areas of commercial and consumer workouts and collections with a strong emphasis in bankruptcy law. Barry has participated in bankruptcy cases throughout the State of Louisiana as well as in other states. Additionally, Barry teaches undergraduate courses including business law, bankruptcy law and business structures at Tulane University and the University of New Orleans as well as being actively engaged in teaching and training for financial institution clients. Barry has given over 60 lectures with accompanying writings and articles, specifically in the area of bankruptcy law, creditor's rights, workouts and recoveries and also lectures on a regular basis in other areas of banking law. These presentations have been made to law, banking and business groups in Louisiana and other states as well as for banking clients. Barry's experience and representation of financial institutions includes:

- Commercial and consumer negotiations, workouts and collections (obtaining and enforcing judgments).
- All aspects of bankruptcy law, including representation of financial institutions in Chapter 7, 11, 12 and 13 filings including stay lift litigation, offset, valuation hearings, adequate protection motions, all types of turnover claims including avoidable preference, fraudulent conveyance and successor liability claims, proofs of claim and claim litigation, Plan and Disclosure Statement negotiation and litigation, executory contracts and unexpired leases, post-petition credit and lending, fraud litigation, discharge and dischargeability litigation, debtor status litigation, claim classification and status litigation, including litigation for determination of secured, unsecured and priority status claims, jurisdictional issues including removal, reopening of closed cases, abstention and referral issues. Additional legal representation has been provided to debtors in Chapter 7 and 11 cases as well as general bankruptcy advice to businesses, creditors, creditor groups, financial institutions and potential debtors; and additionally, providing legal representation to Chapter 7 Trustees.
- Bankruptcy Court appearances in all the Bankruptcy Courts in Louisiana as well as representation in bankruptcy cases in Delaware, Texas, New York and Illinois, providing bankruptcy counsel and advice on an ongoing basis to financial institution clients including teaching and training of financial institutions specifically in the area of bankruptcy law and providing general bankruptcy advice in non-litigation areas to



financial institutions concerning responding to potential debtor's pre-bankruptcy financial activity, underwriting and D-I-P lending.

- Commercial and consumer foreclosures.
- Regulatory compliance and litigation.
- General lender liability and defense litigation.
- Litigation and transactional work relating to real estate titles and pursuing title insurance claims.
- Litigation and general banking advice on negotiable instruments, State and Federal banking regulations, bank privacy and disclosure matters and general regulatory advice, including matters relating to the Federal Fair Credit Reporting Act, Federal Fair Debt Consumer Protection Act, Real Estate Settlement Procedures Act and State Unfair Trade Practice Act.
- Representation of financial institutions in litigation both as a plaintiff and defendant concerning the National Flood Insurance Act and general hazard insurance claims.
- Transactional work including both real estate and non real estate matters including workouts in defaulted loans and originated loans. This includes the preparation of Louisiana-specific security and collateral documents and providing counsel to financial institutions for all aspects of transactional work.
- Coordination of workouts with the Small Business Administration.
- Representation of financial institutions relating to alleged wrongful seizures and improper post-judgment collection activity.
- Providing counsel on underwriting issues.
- Litigation and providing advice to financial institutions relating to successions, probate and post-death financial institution rights.
- Litigation and providing bank advice relation to the application of Federal and State Tax Liens, related tax issues and negotiations and workouts for banks with the Internal Revenue Service.
- Litigation and providing bank advice on specific topics on matters of insurance, employment construction/lien law and contracts.
- Insurance recovery and enforcement relating to secured transactions, specifically real estate, including financial institution representation following Hurricane Katrina in State and Federal Court with over 100 insurers.

Barry represents real estate companies in numerous aspects of real estate and property management law. This includes the negotiation and preparation of real estate documents including leases as well as in litigation involving real estate and lease matters. Barry handles all aspects of housing law including regulatory and compliance, transactional work and litigation. This has included representation of property management companies, property owners, shopping centers, office buildings and apartment complexes. He also has experience in tax and title issues relating to real estate matters.

# BARRY HERBERT GRODSKY

1100 Poydras Street, Suite 2100  
New Orleans, Louisiana 70163-2100  
Phone: (504) 599-8535

---

## EXPERIENCE

October 2009-present

### **Member – Taggart Morton, L.L.C.**

- ♦ Banking law, regulatory compliance and litigation, lender liability, secured transactions, commercial and consumer workouts, real estate transactions and litigation, bankruptcy law, commercial and consumer collections and foreclosures, commercial litigation.
- ♦ Property management law, housing and regulatory law, lease and real estate negotiations, transactional work and litigation.

August 1995 – October 2009

Areas of work:

### **Attorney – Middleberg, Riddle & Gianna, New Orleans, LA**

- ♦ Banking law, regulatory compliance and litigation, lender liability, secured transactions, commercial and consumer workouts, real estate transactions and litigation, bankruptcy law, commercial and consumer collections and foreclosures, commercial litigation.
- Director, Section on Banking and Real Estate

July 1988 – August 1995

Areas of work:

### **Associate – Shushan, Jackson & McPherson, New Orleans, LA**

- ♦ Commercial litigation, bankruptcy law and litigation banking law, real estate litigation, lender liability litigation, security rights

April 1984 – July 1988

Areas of work:

### **Associate – Middleberg, Riddle & Gianna, Metairie, LA**

- ♦ Creditors' rights, banking law, bankruptcy litigation, security rights and workout negotiations

August 1983 – April 1984

### **Associate – Levy, Smith & Gennusa, New Orleans, LA**

August 1982 – July 1983

### **Law Clerk – Honorable Steven R. Plotkin, Judge Civil District Court**

October 1981 – April 1982

### **Student Law Clerk – Levy, Marx, Lucas & Rosen, New Orleans, LA**

Summer 1981

### **Staff Intern – Honorable Billy Tauzin, United States House of Representatives, Washington, D.C.**

- ♦ Legislative research, constituent relations

Summer 1980

### **Student Law Clerk – Nelson & Lombard, New Orleans, LA**



1975 – 1977

**Clerical Assistant – Honorable Morey L. Sear,  
United States District Judge, Eastern District of Louisiana**

## **EDUCATION**

### **Law School**

Tulane University School of Law  
New Orleans, Louisiana  
J. D. Degree, May, 1982

### **Undergraduate**

University of Texas  
Austin, Texas  
B.B.A. Degree with Honors, Business Administration, May, 1979

## **PROFESSIONAL CERTIFICATES**

Licensed to practice law in State of Louisiana, October, 1982

Admitted to practice before United States Fifth Circuit Court of Appeal,  
United States District and Bankruptcy Courts for the Eastern, Middle and  
Western Districts of Louisiana

Notary Public, commissioned in the Parish of Jefferson, qualified in the State  
of Louisiana

## **PROFESSIONAL ASSOCIATIONS**

Louisiana State Bar Association Secretary (2013-2015).

Louisiana State Bar Association Board of Governors (2011-2015).

Louisiana State Bar Association, Fee Arbitration Panel (present).

Louisiana State Bar Association, Committee on Professionalism and Quality  
of Life, 2002-Present; Vice-Chair 2006 – 2008; Chair, Law School  
Professionalism Programs; Chair, Committee on the Profession, 2008-  
present.

Louisiana State Bar Association, Member, Editorial Board, Louisiana Bar  
Journal (2012-present); Editor, Louisiana Bar Journal (2013-2015).

Louisiana State Bar Association, Bar Governance Committee (present).

Louisiana State Bar Association, Budget Committee (present).

Louisiana State Bar Association, Audit Committee (2012-2015); Chair (2015).

Louisiana State Bar Association, Long Range Strategic Planning Committee  
(2010-2011).

Louisiana State Bar Association, Continuing Legal Education Committee,  
2005.

Louisiana State Bar Association, Ad Hoc Committee to Overview Legislative Committee Process and Procedures (2011-2012).

New Orleans State Bar Association, Bankruptcy and Creditors' Rights Committee, 1991 – 1997; 2006

New Orleans Bar Association, Young Lawyers' Division, Board of Directors 1991 –1992

New Orleans Bar Association, Chairperson, Merit Selection Committee, 1996

University of New Orleans, Business Alumni Council, (Charter Member)

Turnaround Management Association

## LECTURES AND PUBLICATIONS

Lecture and Handout: "Bankruptcy for Non-Bankruptcy Judges and Practitioners", Combined Louisiana State Bar Association Annual Meeting and LSBA/LJC Summer School, June 2013.

Lecture and Handout: LawReview CLE, May 2013, Creditors Rights in Bankruptcy" for program entitled "Collection Law: Debtors, Assets and Judgments".

Lecture and Handout: "Collection Law Tips and Strategies", National Business Institute, April 2013 (sections on bankruptcy and ethics).

Lecture and Handout: "So This is What Bankruptcy is About: Peering Over the Fence – A View from Both Sides in Consumer Bankruptcy", Louisiana State Bar Association, October 2012.

Lecture and Handout: "Collection Law Tips and Strategies", National Business Institute, April 2011.

Handout only: "Application and Effect of Bankruptcy Law to Leases", National Business Institute, November 2010.

Lecture and Handout: "Essential Bankruptcy Issues Impacting Collection Law", National Business Institute, New Orleans, Louisiana, April 2010.

Lecture and Handout: "Bankruptcy Ramblings and Rumbblings" New Orleans Bar Association "Procrastinator's Program", New Orleans, Louisiana, December 2009.

Lecture, Handout and Inserts for Presentation: "Ethics in Foreclosure" and "Workouts for Troubled Real Estate Loans", National Business Institute, December 2009.

Bankruptcy Perspectives in the Non-Bankruptcy World, Louisiana State Bar Association, "Catch the Falling Leaves" Seminars, Ashville, North Carolina, October 2008

Lecture and Handout: Recent Consumer Bankruptcy Highlights, Consumer Debt Collection, Loan Servicing and Bankruptcy, The Credit Law Institute, Dallas, Texas, October, 2008

Lecture and Handout: Bankruptcy Aspects in Consumer Debt Collection, National Business Institute, September 2008

Lecture and Handout: 2007 Update on Consumer Bankruptcy Law, New Orleans Bar Association Procrastinators' Program, December 2007.

Lecture and Handout: Louisiana State Bar Association, Summer School Revisited," Current Issues in Consumer Bankruptcy Cases", December 2007.

Lecture and Handout: The Credit Law Institute, Consumer Debt Collection, Loan Servicing and Bankruptcy "Current issues in Consumer Bankruptcy Cases", Dallas, Texas, October, 2007.

Lecture and Handout: "Bankruptcy and Collections: Know Your Rights", National Business Institute, September, 2007.

Lecture and Handout: "Bankruptcy Reform Update – One year Later", National Business Institute, December, 2006.

Lecture and Handout: "Bankruptcy for the Non-Bankruptcy Practitioner: What You Don't Know May Surprise You", Louisiana State Bar Association, New York, New York, November, 2006.

Lecture and Handout: "Practical Examples of an Impractical Law: Bankruptcy Applications in Non-Bankruptcy Settings", Louisiana Justice Community Conference, November, 2006.

Lecture and Handout: "Predatory Lending and Bankruptcy Act Amendments," Lafayette Louisiana, Access to Justice Committee, Louisiana State Bar Association, December 2005

Lecture and Handout: "Bankruptcy for Non-Bankruptcy Attorneys", Louisiana Justice Community Conference, Baton Rouge, Louisiana, May, 2005.

Lecture and Handout: Selected Bankruptcy Topics for Realtors, Presented at Latter & Blum Real Estate Company, May, 2005.

Lecture and Handout: New Orleans Bar Association, "Bankruptcy Traps in Non-Bankruptcy Cases", December, 2004.

Lecture and Handout: Louisiana State Bar Association, "CLE in the City—A Little Bit of Bankruptcy for Everyone", New York, New York, November, 2004.

Co-Moderator with U.S. District Judge Ivan Lemelle, "Breaking Down the Walls of Separation; A Day of Dialogue"; Louisiana State Bar Association, January, 2004; November, 2006

Lecture and Handout "2003 Recent Developments in Bankruptcy", New Orleans Bar Association, December, 2003.

Lecture and Handout: LSU 9<sup>th</sup> Annual Bankruptcy Symposium, Topic: "Discharge, Dischargeability and Estate Planning", November, 2003.



Lecture and Handout: "Creditors' Strategies in Bankruptcy", Lorman Education Services, April, 2003.

Lecture and Handout: "2002 Recent Bankruptcy Developments", New Orleans Bar Association, December 2002.

Lecture and Handout: "Year End Review, Bankruptcy Law 2002", Tulane University School of Law, Continuing Legal Education, December, 2002.

Lecture and Handout: "Creditor's Strategies in Chapter 7 and 13 Bankruptcy Cases", Lorman Education Services, New Orleans, Louisiana, April, 2002.

Lecture and Handout: "Some Basic Questions About Leases Under Bankruptcy Law", presented to Apartment Association of Greater New Orleans, February, 2002.

Lecture and Handout: "2001 Recent Developments in Bankruptcy Law", New Orleans Bar Association, December, 2001.

Lecture and Handout: "Commercial Lending Requirements and Loan Documentation in Louisiana" (Insert on "Bankruptcy Considerations in Commercial Transactions"); Lorman Education Services, New Orleans, Louisiana, February 14, 2001.

Lecture and Handout: "Bankruptcy Law Highlights for 2000", New Orleans Bar Association, December, 2000.

Lecture and Handout: "Foreclosure, Repossession and Bankruptcy Law", presented through National Business Institute, July, 2000.

Lecture and Handout: "1999 Year End Review - Bankruptcy Law", New Orleans Bar Association, December, 1999

Lecture and Handout: "1998 Bankruptcy Highlights," New Orleans Bar Association, December, 1998

Lecture and Handout: "Bankruptcy Brambles and Res Nova," Solo Practitioners and Small Firms Section, Louisiana State Bar Association, February, 1998

Lecture and Handout: "1997 Year-End Review of Bankruptcy Highlights," New Orleans Bar Association, December, 1997

Lecture and Handout: "Recent Developments in Bankruptcy Law," New Orleans Bar Association, December, 1996

Lecture and Handout: "Year-End Review, Commercial and Bankruptcy Law for 1995," New Orleans Bar Association, December, 1995

Lecture and Handout: "Some Practical (and impractical) Aspects of Bankruptcy Law for the Insurance Defense Lawyer," New Orleans Association of Defense Counsel, November, 1995

Lecture and Handout: New Orleans Bar Association, "Procrastinators' Program," Lecture Series - "1994 Bankruptcy Law - Legislative Revisions and Supreme Court Review"

Lecture and Handout: "What to do When the Bankruptcy Bug Bites," Credit Managers Association of California – National Irrigation Credit Group, November, 1992

Lecture and Handout (Published): "Basic Bankruptcy in Louisiana" presented by National Business Institute, November, 1990

New Orleans Bar Association "Brown Bag" Lecture Series; "Recent Developments in Bankruptcy and Debtor/Creditor Law," October, 1990

Lecture and Handout: University of New Orleans, Real Estate Market Data Center – Greater New Orleans Association of Professional Mortgage Women, "Foreclosure Law for 1988 Education Symposium"

Author: "Louisiana Foreclosure and Lender Liability, "Some Tips on Prevention and the Handling of Certain Post-Filing Problems" published in conjunction with National Business Institute Lecture Series in New Orleans and Baton Rouge, Louisiana

Author: "Bankruptcy and Lender Liability, "Some Basic Issues and Problems in Bankruptcy Law Facing Lenders and Lenders' Counsel in the Area of Lender Liability," published in conjunction with National Business Institute Lecture Series in New Orleans and Baton Rouge, Louisiana

Prepared inserts for Louisiana Law on Foreclosure in "The National Mortgage Servicer's Reference Directory," 5<sup>th</sup> Edition, edited by Dennis Jankowski

Co-Author with Judge Steven R. Plotkin: "Damages for Mental Anguish to Non-Injured Relatives, A Time for Change," Louisiana Bar Journal, August, 1983, Volume 1983, Volume 31, Number 2

Television Appearance: "It's the Law," Local Cable Program: "Bankruptcy Law," January, 1993

Lectures and Handouts for Banking Clients:

"The Effect of SBA Liens in the Foreclosure Process"

"Use of Tax Form 1099"

"The Effect of the Homestead Exemption on Recovery"

"Protecting the Judgment through Revival and Reinscription:"

"Some Questions (and a few answers) for Bankers Dealing with Hurricane Katrina"

"Bank Offsets; Why We Have Them and How to Use Them"

"A Quick Overview of Chapter 11 Bankruptcy with Reference to the Provisions Under the New Bankruptcy Law"

"A creditor's Perspective to React and Respond to the Bankruptcy Abuse Prevention and Consumer Protection Act of 2005"

"Special Considerations in the Handling of Lawsuits to Enforce Promissory Notes and Security Agreements"

"Judicial and Strategic Enforcement of Louisiana Judgments"

"Consent Judgments in the Settlement Process"

"Basic Questions About Bankruptcy for Bankers"

"Enforcement of Lease of Movables"

"Enforcing Creditor's Rights Through the Succession Process"

"Consideration of Federal Tax Liens in the Foreclosure Process"

"Enforcement of Real Estate Collateral"

"Title Considerations in Real Estate Workouts and Foreclosures"

"Bankruptcy Considerations for Credit Analysts and Underwriters"

"The Proof of Claim in Bankruptcy"

"Louisiana Real Estate Tax Sales and Redemption"

## TEACHING

Instructor, "Civil Litigation" parts 1 and 2, "Bankruptcy Law", Business Organizations" and "Commercial Law", Tulane University, University College, New Orleans, Louisiana, Fall, 1990 through present; Teacher Recognition Award, 1993, Tulane University; Tulane University, Faculty Fellow, 2001-2004; University of New Orleans, Introduction to Business Law, 2008-2009.

Judge, Tulane University School of Law, Senior and Junior Moot Court Appellate Competition, 1988 and 1989. Senior and Junior Moot Court Trial Competition, 1992 through 2002

Judge, National Moot Court Competition, January, 1999, New Orleans, Louisiana

Judge, International Sports Moot Court Competition, March, 2001 New Orleans, Louisiana

## AWARDS

2013/2014 Louisiana State Bar Association Distinguished Service to the Profession Award.

2014, 2015 and 2016 SuperLawyer, creditor/debtor rights and bankruptcy.

2013 and 2015 New Orleans Top Lawyers, Bankruptcy and Creditor/Debtor Rights/Insolvency and Reorganization Law.

American Bar Association Smythe Gambrell Professionalism Award 2009 through the Louisiana State Bar Association Committee on the Profession.

Louisiana State Bar Association, President's Award, 2008 and 2010

Tulane University Teacher Recognition Award, 1993



# **Charlton B. Ogden III – Curriculum Vitae**

## **Contact Information**

---

Taggart Morton, LLC

[www.taggartmorton.com](http://www.taggartmorton.com)

1100 Poydras St., Suite 2100

71206 Hendry Ave.

New Orleans, LA 70163

Covington, LA 70433

Direct Line: (504) 599-8505

Direct Line: (985) 892-8592

Facsimile: (504) 599-8501

Facsimile: (985) 809-9237

E-Mail: [cogden@taggartmorton.com](mailto:cogden@taggartmorton.com)

Cell Phone: (504) 289-1919

## **Practice Experience**

---

I am a Managing Member of Taggart Morton, LLC and the General Manager of the Covington, Louisiana offices. I have over 33 years experience in personal injury, property damage and premises liability defense, extensively in the areas of transportation, electric and gas utilities, toxic tort and environmental claims. I am also one of Taggart Morton's most experienced litigators with considerable success in numerous high profile jury trials involving severe personal injury and/or extensive property damage claims, including those involving issues of indemnity and insurance coverage, in both federal and state courts throughout southeastern Louisiana.

I am the Coordinator of Taggart Morton's Asbestos Defense Litigation Practice and have been practicing in this arena for over 15 years, with experience in high-end casualty litigation spanning three decades. I have particular knowledge and efficiency in areas most concerning defendants in asbestos litigation, including "state of the art" knowledge of the hazards associated with asbestos exposure, asbestos exposure thresholds and permissible limits, medical causation of asbestos disease and the vast array of legal issues particular to and inherent in all asbestos matters. While involved in the defense of literally hundreds of asbestos cases, I have successfully defended industrial clients against premises liability claims in three jury trials.

## **Practice Areas**

---

General Civil Litigation - Insurance Defense - Premises Liability - Public Utility Law - Property Law - Boundary Disputes - Toxic Torts - Asbestos Litigation - Oil & Gas Law - Trusts and Wills - Estate Planning - Successions - Limited Liability Companies

## **Bar Admissions**

---

Louisiana State Bar, 1981 – USDC, Eastern District, 1981 – US Court of Appeals, Fifth Circuit, 1981 - US Court of Federal Claims, 2012

## **Professional Associations**

---

- Louisiana Bar Association (Member, Sections on Litigation, Real Property and Probate and Trust)
- New Orleans Bar Association
- 22<sup>nd</sup> JDC Bar Association
- US Court of Federal Claims Bar Association
- Louisiana Association of Defense Counsel
- Louisiana Claims Association
- Defense Research Institute (Member, Committee on Insurance Law – Subcommittee, Commercial Insurance) (Member, Committee on Toxic Torts and Environmental Law – Subcommittee, Asbestos and Silica)
- General Counsel:
  - Biloxi Marsh Lands Corporation
  - Lake Eugenie Land & Development Company
  - Bishop & Associates, LLC
  - Ichor Diagnostic Medicine, LLC

## **Peer Review**

---

Martindale-Hubbell – “AV-Preeminent” in areas of Litigation, Toxic Torts and General Practice

## **Seminar Presentations**

---

12/11/2012 National Business Institute, “Probate from Start to Finish”

- “Taking the First Step – Filing an Estate in Probate Court”
- “Understanding the Role of the Personal Representative in Probate Court”
- “Managing the Inventory”

## **Education**

---

University of New Orleans – B.S., 1978  
Tulane University – J.D., 1981

**DONALD J. MIESTER JR.**

7342 Cameo Street, Apt. 5  
New Orleans, Louisiana 70124  
donmiester65@gmail.com  
(504) 442-0049

***SUMMARY OF QUALIFICATIONS***

Extensive litigation experience as a partner and member in two mid-sized New Orleans law firms and as an elbow law clerk to two federal district court judges. Excellent communication, planning, and motivation skills.

***PROFESSIONAL EXPERIENCE***

**TAGGART MORTON, LLC**, New Orleans, LA. 7/06 – Present. Member.

- Chaired firm's Appellate Practice Section.
- Handled trials and appeals in Louisiana courts and the federal Fifth and Eleventh Circuit Courts of Appeal.
- Assisted in supervising firm staff.
- Wrote many of firm's more significant trial and appellate submissions, in fields including bankruptcy; breach of contract; torts and personal injury; civil procedure; child custody; successions; divorce; and spousal support.

**UNITED STATES DISTRICT COURT FOR THE EASTERN DISTRICT OF LOUISIANA**, New Orleans, LA. 5/00 – 7/06. Law Clerk to Judge Mary Ann Vial Lemmon.

- Assisted federal district judge in all aspects of operation of chambers, including preparation of legal memoranda and opinions.

**SLATER LAW FIRM**, New Orleans, LA. 3/94 - 4/00. Partner.

- Handled every phase of trial and appellate work in federal and state courts.
- Supervised firm secretaries, paralegals, and associates.
- Assisted in formation and founding of firm.

**MONROE & LEMANN**, New Orleans, LA. 9/91 - 3/94. Associate.

- Performed legal research, drafted memoranda and pleadings, and engaged in discovery and litigation of cases.

**UNITED STATES DISTRICT COURT FOR THE WESTERN DISTRICT OF LOUISIANA**, Alexandria, LA. 8/90 - 8/91. Law Clerk to Judge F.A. Little, Jr.

- Assisted federal district judge in preparation of legal memoranda and opinions.



## ***EDUCATIONAL BACKGROUND***

### **TULANE UNIVERSITY SCHOOL OF LAW, New Orleans, LA.**

J.D., *magna cum laude*, 1990. GPA: 3.55/4.00. Class Rank: 19/263 (Top 7%).

- Associate Editor, *Tulane Law Review*; Order of the Coif; Order of the Barristers.
- First Place, Senior Appellate Competition, 1990; National Trial Team, 1990; National Appellate Moot Court Team, 1989 and 1990 (Best Oralist, Regional Finals); J. Braxton Craven Constitutional Law Moot Court Team, 1988 (returned to coach 1994 team, which won national championship).

### **TULANE UNIVERSITY, A. B. FREEMAN SCHOOL OF BUSINESS, New Orleans, LA.**

B.S.M., *magna cum laude*, 1987. GPA: 3.61/4.00. Class Rank: 10/188 (Top 5%).

- Dean's List; Tulane Honors Program; National History Honor Society; Delta Sigma Rho-Tau Kappa Alpha Speech Honor Society; President, Glendy Burke Debate Team.

### **JESUIT HIGH SCHOOL, New Orleans, LA.**

Special Diploma of Merit, *magna cum laude*, 1983.

## ***OTHER EXPERIENCE, PROFESSIONAL ORGANIZATIONS, AND AWARDS***

- Admitted to Louisiana Bar, 1990; United States District Courts for the Eastern, Middle, and Western Districts of Louisiana, 1991; United States Fifth Circuit Court of Appeals, 1994; United States Supreme Court, 2008.
- Active in the Solo and Small Firm Section of the Louisiana Bar.
- Selected to *Super Lawyers*, 2023; *New Orleans Magazine* Top Lawyers, 2017-22.
- Computer literate; proficient in Microsoft Word, Westlaw, and Lexis.

## ***PUBLICATIONS AND PRESENTATIONS***

*A Comparative Look at Writ Practice*, presented as part of the Advanced Appellate Practice seminar sponsored by the Louisiana State Bar Association, New Orleans, LA, December 4, 2024.

*State and Federal Appeals: Basics and Rule Changes*, presentation sponsored by Louisiana State Bar Association, Covington, LA, June 15, 2022.

*Appellate Practice: COVID-19 and Other Updates*, presentation sponsored by Louisiana State Bar Association, CLE Webinar, June 3, 2020.

*Better Briefs and Oral Arguments on Appeal*, presentation sponsored by Solo and Small Firm Section of the Louisiana State Bar Association, New Orleans, LA, May 10, 2019.

*Effective Appellate Advocacy*, presentation sponsored by Solo and Small Firm Section of the Louisiana State Bar Association, April 9, 2019.

*Recent Developments in Appellate Practice*, presentation sponsored by Solo and Small Firm Section of the Louisiana State Bar Association, September 7, 2018.

*Appellate Practice*, presentation sponsored by Slidell Bar Association, Slidell, LA, March 5, 2022.

*Common Mistakes on Appeal*, presentation sponsored by 21st Judicial District Court Bar Association, October 15, 2014.

*How to Handle Post-Trial Issues*, presentation sponsored by National Business Institute, New Orleans, LA, March 22, 2013.

*Common Mistakes on Appeal*, presentation sponsored by Jefferson Parish Bar Association, Biloxi, MS, April 13, 2012.

*Maximizing your Chances of Success on Appeal*, presentation sponsored by New Orleans Bar Association, New Orleans, LA, January 24, 2012.

*Trade Secret Misappropriation under the Louisiana Trade Secrets Act*,  
44 La. Bar J. 326 (1996).

*Criminal Liability for Corporations that Kill*,  
64 Tul. L. Rev. 919 (1990).

## **JAMES R. MORTON**

**Taggart Morton, L.L.C.**  
1100 Poydras Street, Suite 2100  
New Orleans, Louisiana 70163-2100  
Telephone: 504-599-8507; Cell: 504-491-2330  
jmorton@taggartmorton.com

*(Admitted to practice in Louisiana, Texas and Illinois)*

### **Education:**

Juris Doctor, Loyola University, New Orleans  
Graduated May, 1981

Tulane University, Bachelor of Science, Mathematics  
Graduated May, 1973

### **Admitted to Practice Law:**

Louisiana Bar, 1981

Illinois Bar, 2006

Texas Bar, 2007

### **Employment History:**

Taggart Morton, L.L.C. (1997 to Present), *Founding Member and Partner*

Founding member of Taggart Morton, L.L.C. and practice areas include Real Estate; Financing; Oil & Gas; Zoning; Land Use; Hotel; Environmental; General Civil and Business Practice.

Monroe & Lemann (1981–1997), *Partner*

Practice included Real Estate; Financing; Oil & Gas; Zoning; Land Use; Hotel; Environmental; General Civil and Business Practice.

Shell Oil Company, (1977–1981)

Land Department, culminating as Manager of the Land Title Section.

Sidney Lazard (1975–1977)

Independent Oil Operator



ODECO (1974–1975)

Assistant to Reservoir Engineer

Dresser Atlas (1973–1974)

Well Logging Engineer

**Admitted to Practice Before the Following Courts:**

United States Court of Appeals for the Fifth Circuit.

United States District Court for the Eastern and Middle Districts.

Supreme Court of Louisiana and all Louisiana state courts.

**Associations:**

Louisiana State Bar Association (Member, Real Property Committee and Environmental Law Committee)

New Orleans Bar Association (Secretary, 1998-1999; Third Vice President, 1997-1998; Member, Board of Directors, 1995-97; Real Property Committee, Chairman 1993-94; Environmental Law Committee)

Illinois State Bar Association

Texas State Bar Association

**Miscellaneous:**

New Orleans Bar Foundation (President, 2000-2003)

New Orleans Legal Assistance Corporation – Board of Directors 1995-2001.

Loyola University School of Law - Adjunct Professor of Law, Real Estate Documents, 1992-2005

Author, Louisiana Bar Journal, Recent Developments Column for Immoveable Property Law, Fall, 1997.

Served as Speaker at various real estate and land use seminars.

**Narrative:**

Mr. Morton has been practicing in the area of real estate and oil, gas and mineral law for over 40 years. During that time, he has counseled large landowners regarding oil and gas leases, mineral rights agreements, mineral and pipeline easements, gas contracts, evaluations of oil and gas interests, and all aspects of oil and gas development.

He has also formed master development plans for residential, commercial and industrial acreage. These plans address the preparation of comprehensive restrictions, Planned Unit Developments, dedications of public and other rights-of-way, conservation easements to address wetlands and other environmental issues, consistent with the requirements of the various governmental authorities with jurisdiction over the property. His practice also frequently requires that he draft joint venture agreements to provide for the development of property with equity partners.

He has handled title opinions regarding acquisitions and expropriations for rights of way for utilities for various Entergy entities, as well as negotiating with landowners in connection with such acquisitions.

His practice area with developers includes the development of commercial, retail, industrial, hotel and multi-family residential properties. Our practice involves securing the right to purchase real estate, site plan and zoning approvals, compliance with the local governmental codes and ordinances, negotiating construction contracts and securing construction financing.

## *Jessica Salafia Ward*

25 Emile Avenue, Kenner, Louisiana 70065 | 504.458.7879 | [jward@taggartmorton.com](mailto:jward@taggartmorton.com)  
Proficiency in Lexis, Westlaw, Pacer and various court database systems,  
as well as Microsoft Word, Outlook, Windows and Egnyte.

### **ADMISSIONS TO LEGAL PRACTICE**

---

2018: Louisiana, United States (Attorney)

2014: Victoria, Australia (Solicitor)

### **CURRENT EMPLOYMENT**

---

#### **Taggart Morton, LLC**

Associate Attorney, May 2018 to Present

Legal Assistant to Managing Partner, Aug 2016 to May 2018

I work closely with the Managing Partner of Taggart Morton, L.L.C., a New Orleans full-service law firm. I conduct interviews and screen clients; conduct extensive legal research and analysis of legislation, case law, court rules and insurance/health care regulations; develop legal theories and prepare original pleadings and other submissions in federal and state courts; prepare written discovery; conduct extensive document review; interact with clients, courts, attorneys and staff verbally and in writing, including addressing client compliance issues in healthcare, antitrust and employment law; prepare witness and matter materials for depositions and case preparation; organize, assist and present cases at trial; organize presentations for clients and trade groups. My duties also include oversight and recommendations related to law practice management of the firm.

### **EDUCATION**

---

#### **Loyola University New Orleans College of Law, New Orleans, Louisiana**

Masters of United States Law (LL.M.), 2016 Graduate *cum laude*

##### **Honors & Activities**

Highest Grade Awards: Courts in a Federal System (2016); Obligations Law (2015)

Gillis Long Poverty Law Center Loyola College of Law Public Service Award 2016,

Tuition Scholarship; BARBRI Public Interest Scholarship; Alumni Association Graduation Scholarship

Skills Classes: Children's Advocacy and Domestic Violence; Social Justice Lawyering; Anatomy of a Criminal Case; Trial Skills Drills, Drafting Discovery

#### **La Trobe University, Melbourne, Australia**

Bachelor of Law/Bachelor of Arts, Diploma in Languages (French), 2014 Graduate

##### **Honors and Activities**

Study abroad scholarship recipient: completed programs in Italy (2009, 2011), China (2010) and the United States of America (2013)

Participated in the LIV & Hanover Mooting Competition (2014)

Participated in the 'Lock Up a Lawyer' Fundraiser: Slept overnight in a cell at Pentridge Prison to raise money for Melbourne City Mission's justice services (2014)

Participated in the Castan Human Rights Moot (2011)

Highest Grade in first-year university French Studies (2011)

La Trobe University Junior Moot Competition: Grand Finalist (2010)

Participated in the Asia-Pacific Model United Nations Conference (AMUNC) (2009)

La Trobe University Client Interviewing Competition: Winner (2009)

La Trobe University Junior Moot Competition: Winner (2009)

First Place in the European Union Delegation to Australia IUEU National Essay Competition (2009)

Commonwealth Accommodation Scholarship (2008)



## **PRIOR LEGAL EMPLOYMENT AND EXPERIENCE**

---

### **Attorneys for ELLA, The Entertainment Law Legal Assistance (ELLA) Project**

Volunteer Attorney, Sept 2018-Mar 2020

I worked with the ELLA Team to assist low to moderate income artists and musicians from concept to completion in issues of copyright, trademark, business formation, contract preparation, negotiation and review, licensing, and other entertainment law matters.

### **Corrs Chambers Westgarth, Melbourne, Australia**

Lawyer, Mar 2014-Jun 2015

Rotated through Construction, Litigation and Corporate & Finance practice groups. Committee member of Corrs Business in Europe Group and LGBTI @ Corrs.

Drafted various claims, submissions and advices; conducted contract and document review and analysis; organised and filed correspondence; conducted extensive legal research on various areas of law; independent client contact; attended client meetings; attended internal learning conferences and excellence seminars; made Court appearances.

### **Nunzio Lucarelli Q.C.**

Legal Secretary, Mar 2012-Nov 2012

Prepared, reviewed and finalised documents; legal research; document filing; regular contact with barristers and solicitors; extensive typing and dictaphone tasks.

### **Fairfields Immigration Lawyers**

Paralegal, Aug 2009-Mar 2011

Extensive client contact; liaised with various government departments; prepared court documents for filing; managed individual migration matters.

### **Farrell Lusher Solicitors**

Office Administrator, Jan 2007-Jan 2008

Conducted initial contact with prospective clients; familiarity with law firm and business environment; compiled briefs for Counsel; developed proficiency in file management.

## **CRIMINAL LAW, COMMUNITY & SOCIAL JUSTICE EXPERIENCE**

---

### **Loyola University New Orleans College of Law, New Orleans**

Legal Assistant to Former Dean Maria Pabón López, Professor of Law, Aug 2015-Present

Conducting Federal criminal law case work and related research; drafting articles; conducting various research projects.

### **Capital Appeals Project, New Orleans**

Law Intern, Dec 2011-Mar 2012; Sept 2013;

Law Fellow, Aug-Nov 2016

Assisted with case preparation; legal research; attended Court; transcript writing and review; conducted contemporaneous reports from the field; prepared memoranda; attended Louisiana State Penitentiary (Angola); worked with LCAC.

Awarded the Sir Rupert Hamer Fellowship 2015 from Reprieve Australia in recognition of my contribution to the The Justice Center.

### **The Capital Punishment Project, American Civil Liberties Union (ACLU), North Carolina**

Weekend Volunteer, Mar 2016

Conducting juror interviews; working closely with case attorneys and investigators, preparing memoranda, travelling interstate.

### **Innocence Project New Orleans, New Orleans**

Summer Intern, May-Aug 2016 (upcoming internship)

Assisting with case preparation; DNA research and filing; legal research; transcript review; conducting contemporaneous reports from the field; preparing memoranda; attending Angola.

### **Orleans Public Defenders Office, New Orleans**

Intern Investigator, Jun 2013-Sept 2013

Conducted investigations; assisted with case preparation; reviewed and analysed documents and correspondence; located and interviewed witnesses; attended training sessions; prepared statements, memoranda and investigative reports.

### **Justice Connect Homeless Law, Melbourne, Australia**

Lawyer, Apr 2014-Jun 2015

Assisted clients on a pro bono basis primarily in relation to debt and tenancy matters. Attended training and client visits in prison as part of the Port Phillip Prisoners' Legal Pilot Program; drafted various claims, submissions and advices; conducted contract and document review and analysis; organised and filed correspondence; conducted extensive legal research on various areas of law and policy; independent client contact; attended client appointments; attended internal training and learning conferences seminars; made Tribunal and Court appearances.

### **West Heidelberg Clinical Legal Service (WHCLS), Melbourne, Australia**

Student Lawyer, Jul 2012-Dec 2012

Completed clinical legal placement working predominantly on criminal law, immigration and freedom of information matters; client contact; conducted legal research; liaised with government departments; prepared documents for filing; matter management.

### **Youth Law, Campaign Respect, Melbourne, Australia**

Weekend Volunteer, Oct 2009

Campaigned and worked with volunteers on a project focussed on discriminatory targeting of youth for public transport violations; conducted surveys; promotional duties.

## **CIVIC INVOLVEMENT**

---

### ***United States of America***

NOLA to Angola bike ride: Raised funds to support the Cornerstone Builders' Bus Project, 2015  
K10: Katrina Day of Service (New Orleans East), 2015  
Innocence Project New Orleans Gala Fundraiser, 2013  
St. Baldrick's Foundation Fundraiser, 2013  
Martin Luther King Day of Service (United Saints Recovery Project), 2013  
Member of American Bar Association, Federal Bar Association, Student Bar Association, Criminal Law Society, National Lawyers' Guild

### ***Australia***

Mercy Campaign, monitored emails during petition for Andrew Chan and Myuran Sukumaran (2015)  
Oxfam Trailwalker: Walked 100kms to raise money to help overcome poverty and injustice (2015)  
Judicial Mentoring Program at the Melbourne Magistrates' Court under the supervision of His Honour Magistrate Vandersteen (2011)  
Crockett Chambers Court Experience Program (2011)  
Member of Reprieve Australia; Australian Lawyers for Human Rights; Golden Key Honour Society;  
Australian-Italian Leaders of Tomorrow (ALTO); Law Institute of Victoria; Scotch Malt Whisky Society;  
*Alliance Française de Melbourne*

## **OTHER PROFESSIONAL EXPERIENCE & ACTIVITIES**

---

### **La Trobe University**

Law Student Mentor, 2012  
Established University French Club, 2010  
Law Students' Association (Student Representative, 2009; Competitions Officer, 2010)

### **Perspective Youth Journal**

Sub-editor, 2009/10: Edited submissions for biannual academic journal; worked with authors and other editors; promotional duties.

## **PUBLICATIONS**

---

Jessica Salafia, *Mickey's Monopoly or Pluto's Potential? The Disney-Fox Merger and the Antitrust Anomaly*, American Bar Association Section of Antitrust Law, Perspectives in Antitrust, Volume 7, Number 2 (2018/2019).

Jessica Salafia, *Statute of Limitations Considerations*, American Bar Association Young Lawyers' Division (2017).

Maria Pabon Lopez and Jessica Salafia, *No Hablamos Habeas: How Incarcerated Immigrant Inmates Struggle with Ineffective Assistance of Counsel Language Access Claims*, 56 Santa Clara L. Rev. 703 (2016).

Perry R. Staub, Jr. and Jessica Salafia, *Small Employers: Self-insure Your Way out of PPACA*, American Bar Association Health eSource, Vol. 13 No.3, (November 2016).

## **PROFESSIONAL REFERENCES**

---

Perry R. Staub, Jr.  
Managing Partner  
Taggart Morton, LLC  
1100 Poydras Street, Suite 2100  
New Orleans, Louisiana 70163  
504.415.6969  
[pstaub@taggartmorton.com](mailto:pstaub@taggartmorton.com)

Mark Van Horn  
Partner  
Taggart Morton, LLC  
1100 Poydras Street, Suite 2100  
New Orleans, Louisiana 70163  
504.236.7987  
[mvanhorn@taggartmorton.com](mailto:mvanhorn@taggartmorton.com)

Janet D. McGrew  
Senior Attorney  
Taggart Morton, LLC  
1100 Poydras Street, Suite 2100  
New Orleans, Louisiana 70163  
504.628.8828  
[jmcgrew@taggartmorton.com](mailto:jmcgrew@taggartmorton.com)



**MATTHEW S. FOSTER**  
2514 Marais Street, New Orleans, LA 70118  
(504) 507-0376 | mfooster@taggartmorton.com  
Louisiana Attorney (Bar No. 36848)

### **BAR MEMBERSHIPS AND COURT ADMISSIONS**

Louisiana Bar Association Member, 2016  
American Bar Association Member, 2015  
Bar Association of the Federal Fifth Circuit, 2022

Admitted to practice in all Louisiana State courts by the Louisiana Supreme Court  
Admitted to practice in all three Federal United States District Courts in Louisiana  
Admitted to practice in the Federal Fifth Circuit Court of Appeal

### **OTHER PROFESSIONAL ASSOCIATIONS**

National Lawyers Guild

### **LEGAL WORK EXPERIENCE**

**Taggart Morton, LLC**, Associate Attorney, November 2017-Present

**Practice Areas:** Health Care, Personal Injury, Administrative Law, Business Litigation, Constitutional Law, Probate

**Duties:** Primarily litigation, including the drafting and filing pleadings, drafting appellate briefs and arguing appeals, conducting discovery, meeting with clients, conducting legal research, handling hearings and trials, and case management.

**The Pro Bono Project**, May 2017-Present

**Duties:** Handling various civil cases pro bono

**Freelance Legal Research and Writing**, June 2015-December 2018

**Stuart H. Smith Law Clinic and Center for Social Justice**, August 2014-May 2015

Student Practitioner Under Louisiana Supreme Court Rule XX, Criminal Defense Clinic

**Duties:** Representing criminal defendants under professional supervision

**Research Assistant**, January 2015- April 2015

**Duties:** Assisting Professor Mitch Crusto in the writing of a book

**Research Assistant**, September 2014- October 2014

**Duties:** Assisting Professor Chunlin Leonhard in the writing of an article

**Southeast Louisiana Legal Services**, March 2014-August 2014

**Duties:** Research, client interviews, writing memos, assisting with child welfare cases

**Capital Defense Project, New Orleans, Louisiana** July 2013-March 2014

**Duties:** Research, preparing litigation documents

**DLA Piper Law, Moscow, Russia** June 2013

**Duties:** Editing work, writing memos, research

### **EDUCATION**

**Loyola University New Orleans College of Law, New Orleans, Louisiana**

**Juris Doctor, May 2015**

Certificates in Social Justice and International Law

G.P.A.: 3.634 Rank: top 10% (15/195)

**Honors:**

- *Magna Cum Laude*

- Six Law Excellence Awards (for highest grade) in Common Law Property, Torts, Comparative Judicial Systems, Comparative Russian Constitutional Law, Mediation & Arbitration, and Conflict of Laws
- Crowe Scholar
- Law Review Member
- Frederick J. Gisevius, Jr. Scholarship Recipient

**Publications:**

- Comment, *I'll Believe It When You See It*, 60 Loy. L. Rev. 857 (2014)

**University of Missouri, Columbia, Missouri**  
**Bachelor of Arts in History, Dec 2011**

**COMPUTER SKILLS**

Proficient using Westlaw, Fastcase, LexisNexis, & Microsoft Office programs (Word, Excel, and PowerPoint)

Familiarity with PACER and various Louisiana ecourt and efilings systems (Odyssey, ClerkConnect, Tybera, etc.)

**OTHER/COMMUNITY INVOLVEMENT**

Task Force Member for House Resolution 51, Regular Session 2021, relating to study of compassionate release, medical treatment furlough, and medical parole requirements.

Volunteer Attorney at [la.freelegalanswers.org](http://la.freelegalanswers.org)

Second Harvest Food Bank Volunteer

LSPCA Dog Foster

New Orleans Shuffleboard League