



→ Eric A. Klein

Partner

1901 Avenue of the Stars
Suite 1600
Los Angeles, CA 90067

T: +1.310.228.3728

C: +1.310.503.1611

F: +1.310.228.3988

eklein@sheppardmullin.com

Eric Klein is Team Leader of the 200+ attorney national healthcare practice, which was named three times in the last seven years (2021, 2017, 2014) as *Law360* U.S. Health Care Practice Group of the Year. He is a partner in the Century City office of Sheppard Mullin, a full service AmLaw Global 100 law firm with offices throughout California, New York, Chicago, Washington, D.C., Dallas, London, Brussels, Seoul and Shanghai. With over 35 years of practical legal and business experience, his multi-sector practice focuses on *healthcare transactions and regulation*, the current *industry trends of population health management, global risk bearing entities, consolidation, convergence and payor/provider alignment*, the *transformation to value and risk-based reimbursement systems* and *private equity*. Known in the business community for his creative solutions and deal-making ability, Eric uses deep industry knowledge, entrepreneurial solutions, sophisticated negotiation skills and effective legal process to meet the complex business and legal needs of both established and emerging companies.

Eric is one of the nation's most active physician group, health plan and hospital M&A and joint venture lawyers, having advised on over 85 hospital merger, acquisition and/or joint venture projects, over 85 health plan merger and acquisition projects, and many of the largest physician services transactions nationally, including a majority of all major managed care physician group transactions in the Western U.S. in the past ten years. Eric is one of the most experienced lawyers nationally in population health management, physician alignment and global risk transactions.

Eric has been nationally recognized as a leading healthcare lawyer.

- *Chambers USA Guide to Leading Lawyers*: Eric Klein "is particularly strong in large transactions" and "has an excellent knowledge base and a huge breadth of experience." Sources say: "In addition to his wonderful grasp of the law, he understands the medical issues and the business aspects - this is a real gift." He is "a sophisticated transactional lawyer" who is "really knowledgeable and really understands the law because he has done a lot of deals," and "He is singly the most talented healthcare lawyer that I have encountered. He is brilliant but practical. He will offer solid, clear recommendations and will make it happen just the way he says."
- *Legal 500 Guide*: He is "a wonderful negotiator, creative, experienced and skillful." Eric is "extremely well versed in healthcare law, and an excellent strategist." He "has the skills necessary to get the deal done" and is "one of the best M&A lawyers in the industry."
- *Law360*: Twice named as Healthcare Law National MVP
- 2020 The Deal - Healthcare, Pharma & Biotech Dealmaker of the Year (Middle Market Short List)
- 2020 and 2019, The Daily Journal – Top Health Care Lawyers
- National Law Journal 2018 M&A Trailblazer

Scope of Practice

Eric represents physician groups, hospitals, health plans, ancillary service providers and private equity and strategic investors. He works with publicly traded and privately held companies across the country and advises both for-profit and non-profit clients on mergers and acquisitions, strategic alliances and joint ventures, operational and contracting matters, strategic planning, HMO licensing and compliance, regulatory matters and information technology transactions.

Physician Organizations: Eric is known as one of the leading physician organization lawyers in the country. Eric works on both middle market and multibillion dollar transactions. In some of the largest physician organization transactions in recent years, he represented Cigna in its 2021 acquisition of telehealth company MDLive, the SPAC Alkuri Global Acquisition Corp. in its 2021 merger with multinational virtual care provider Babylon Health, New York's CareMount Health Solutions in its 2020 affiliation with UnitedHealth's Optum, and Summit Medical Group in its 2019 merger with Warburg Pincus's CityMD. His clients have included many of the largest and most well-known physician groups, independent practice associations (IPAs), accountable care organizations, CINs and management services organizations (MSOs). He represents physicians organizations in all lines of business, including fee for service, Medicare Advantage, Medicaid and commercial. Eric has been advising on CMMI Medicare Direct Contracting programs and assisting clients with these and other innovative payor contracting, including "pathway to risk" and value-based contracts. Eric generally forms between 10-15 management services companies per year and is considered one of the nation's experts on corporate practice of medicine issues, affiliations between medical groups and MSOs and the regulatory, accounting and tax issues that arise in these structures. He acts as a strategic advisor to physician organizations to help them with regional and national expansion, payor/provider partnering and moving to professional, full and global risk. Eric and his team represent many of the nation's leaders in population health and coordinated care, including Agilon Health, Aledade, Alignment Health, CareMore, CareMount, ChenMed, Evolent Health, Iora Health, Landmark, Lumeris, Prospect Health, VillageMD and WellBe Senior Medical.

Health Plans and Health Insurance: Eric has helped to create, acquire, joint venture and operate multiple health plans across the country, including for Medicare Advantage, Medicaid, commercial and Marketplace products. He has led 85+ health plan merger and acquisition projects in recent years. Eric also has been working on innovative payor/provider initiatives to create downstream global risk bearing entities in multiple states for multiple clients. Eric works closely with multiple Blue Cross Blue Shield plans on their strategic growth and population health management initiatives, including (i) advising Blue Cross Blue Shield of North Carolina in their 2021 joint venture with private equity fund Deerfield Capital to provide support to the North Carolina physician community through a new management company, investment, transition to value-based care and acquisitions; and (ii) advising Blue Shield of California in its 2019 launch of its physician initiative, Altais Health, to support the independent physician community in California and in its affiliation with 2,700 physician IPA Brown & Toland Physicians. Eric has helped multiple national health plans with improving their IPA and other provider template contracts. Eric is working on multiple Knox-Keene applications and we represent half of all currently licensed restricted Knox-Keene HMO license holders in California, and obtained a majority of all restricted Knox-Keene health plan licenses granted in California in recent years. He obtained a Knox-Keene license for a new vision services plan in nine months, one of the fastest licensure processes in the history of the Department of Managed Health Care. He has assisted Knox-Keene plans with licensure issues, compliance and corrective action plans, restructuring, acquisitions and disposition of plans, holding company structures and credit facilities. Eric has worked for, among others, Blue Shield of California, Cambia Health Solutions, Cigna, Delta Dental, Molina, Premera and other regional, national and Blue Cross Blue Shield plans.

Hospitals and Health Systems: In the hospital sector, Eric has led 80 hospital purchase/sale and joint venture projects and has worked on health system affiliations, physician alignment initiatives, shared services joint ventures, hospital networks, conversion of non-profit hospitals into for-profit hospitals, creation of clinically integrated networks (CIN), partnering with private equity funds, payor contracting (including value-based and risk-based contracts), credit facilities for hospitals, establishment and acquisition of outpatient treatment centers, outsourcing of hospital departments, revenue cycle management contracting and outsourcing, and hospital syndications. He also has assisted with payor contracting and disputes, governmental investigations and licensing, and hospital-physician contracts and joint ventures. He also has assisted academic medical centers and health systems in the rationalization and improvement of physician compensation systems, community/faculty practice plan alignment mechanisms and establishing and improving Medicare Advantage HCC-RAF risk adjustment programs. Eric represents national health systems, leading regional health systems, community hospitals, children's hospitals and academic medical centers, as well as private equity funds investing in health systems and hospitals.

Private Equity: Eric and his team have developed a leading healthcare multi-sector private equity practice. Selected private equity clients include Welsh, Carson, Anderson & Stowe, TPG Capital, General Atlantic, Clayton Dubilier & Rice, H.I.G. Capital, Varsity Healthcare Partners, Amulet Capital, Havencrest Capital Management and Blue Mountain Capital. Eric and his team helped launch OneOncology for General Atlantic, a leading oncology provider and services company, Kadiant for TPG in the field of applied behavioral analysis for autism, agilon health for Clayton Dubilier & Rice in the Medicare Advantage downstream global risk market, US Digestive Health for Amulet Capital, and Orthopedic Care Partners for Varsity Healthcare Partners with the acquisition of The Orthopedics Institute and The Steadman Clinic. Eric and his team can provide transactional, healthcare regulatory and financing legal services for both platform companies and additional growth/tuck-in acquisitions. Recent sectors have included primary care, multi and single specialty physician organizations, hospitals, behavioral health, dental and vision, MSOs, Medicare Advantage and Medicaid HMOs and health plans, palliative care, healthcare information technology, laboratory and ancillary services.

Eric also lectures nationally on negotiation skills and has trained many business leaders, investment bankers, lawyers and entrepreneurs in basic and advanced negotiation techniques. He is a frequent lecturer and has been a featured speaker at the Blue Cross Blue Shield Association National Summit, America's Physician Groups annual meeting, Health Plan Alliance, Alliance of Community Health Plans and other trade associations.

Honors

M&A Client Service All-Star, *BTI Consulting*, 2021

Healthcare, Pharma & Biotech Dealmaker of the Year (Middle Market Short List), *The Deal*, 2020

Top Health Care Lawyers, *The Daily Journal*, 2019-2020

Best Lawyer in America, Healthcare, *Best Lawyers*, 2018-2023

2019 Lawdragon 500 Leading Lawyers in America Guide

Lawyer of the Year, Leader in Law Awards, *Los Angeles Business Journal*

Twice named as Healthcare Law National MVP, *Law360*

Most Influential M&A Advisor, *Los Angeles Business Journal*

Leading Lawyer, California Healthcare, *Chambers USA*, 2012-2022

Healthcare, *Legal 500*, 2011-2022

He has received the highest quality rating of "AV" from the Martindale-Hubbell legal directory

Southern California Super Lawyer for Securities and Corporate Finance in *Los Angeles Magazine* and *Southern California Super Lawyers Magazine*, 2005, 2006, 2009, 2014-2022

Leading Lawyers, Service Providers, *Legal 500*, 2022

Experience

Recent transactions and projects include:

- Multiple billion+ dollar merger, acquisition and joint venture projects for health plans and for physician organizations
- Multiple hospital and health system merger, joint venture and vertical integration transactions, involving health systems, private equity and health plans
- Representing more physician organizations in their affiliations with and sales to **Optum** than any other law firm
- Representing **Cigna Inc.** in the design and implementation of a national risk-sharing strategic alliance with **Oscar Health**, a tech-driven health insurance company, to offer commercial health solutions to small businesses with 1 - 50 employees. The companies will provide affordable, seamless, fully insured health benefits under the Cigna + Oscar brand to the small group market using Cigna's provider networks and experience and Oscar's data-driven technology and consumer-oriented solutions.
- Advising leading private equity fund **Welsh, Carson, Anderson & Stowe** in a \$600 million joint venture with **Humana** to create a new innovative model to develop primary care centers to treat seniors insured by Medicare Advantage plans. This exciting approach partners private equity's capital and rapid scaling expertise with a leading national health plan to rapidly accelerate Humana's proprietary provider network and positively impact patient access and outcomes. It also evidences the continuing provider trend toward global risk-based reimbursement approaches to address the total cost of care.
- The second largest physician services M&A transaction of 2019, the merger of **Summit Medical Group** with **Warburg Pincus'** urgent care center company **CityMD**
- Representing **Blue Shield of California's** new healthcare services and physician practice platform **Altas**, an innovative healthcare services provider pioneering next-generation clinical tools and technology, in its strategic affiliation with **Brown & Toland Physicians**, a San Francisco/Bay Area independent practice association with a network of more than 2,700 primary care and specialist providers which provides front-line care to more than 350,000 patients throughout the San Francisco Bay Area and also operates a Medicare Advantage restricted Knox-Keene healthcare service plan
- Representing multiple **Blue Cross Blue Shield** health plans in provider alignment, merger and acquisition and innovative contracting transactions
- Advising on cutting-edge Medicare Advantage, Medicaid and commercial global risk initiatives, such as advising **Fresenius** on its contract with **Humana** for a 35 state global risk bearing arrangement for dialysis patients, and representing **agilon health** since its founding in its national expansion with a Medicare Advantage focused downstream global risk based joint venture model that promotes transformation to risk by leading hospitals and physician organizations, including the Austin Regional Clinic and Central Ohio

Primary Care

- Representing leading Medicare Advantage global risk based clinic and IPA model **ChenMed** in its growth strategy and multiple innovative partnerships, like its alliance with **OhioHealth**, the largest public hospital system in Ohio to help create a senior focused, aligned clinic system
- Growing Medicare Advantage lines of business for health plans, health systems, and physician organizations, including the establishment of effective HCC-RAF risk adjustment programs, the affiliation of **Stanford University Health** with **Lumeris** to create a population health program for Stanford patients and grow Stanford's Medicare Advantage health plan, and **Newlight Partners'** equity investment in physician-led Medicare Advantage health plan **Zing Health**
- Advising on the Hong Kong Stock Exchange initial public offering of **Jinxin Fertility Group Limited**, the first ever of a healthcare services company with operations in both the United States and China. We acted as United States counsel in the US\$400 million public offering resulting in a publicly traded multinational assisted fertility services company with a market capitalization of US \$3+ billion
- The sale and recapitalization of **Pediatric Associates**, the largest pediatric physician organization nationally, in its partnership with leading healthcare private equity fund **Summit Partners** to expand its global risk-based population health management system into multiple states. Pediatric Associates combines its population health management advanced techniques, telemedicine programs and sophisticated financial management of pediatric total cost of care to achieve high quality and cost-efficient care.
- The strategic alliance between **Walgreens** and our client **VillageMD**, a leading national provider of primary care, to operate state-of-the-art comprehensive primary care clinics at Walgreens stores
- The \$4.4 billion **DaVita** acquisition of the leading coordinated care, risk-bearing physician organization **Healthcare Partners**, which was named the Deal of the Year in the healthcare industry by the M&A Atlas Awards

Articles

- The Siege Continues: The Justice Department is Investigating Four Additional Medicare Advantage Plans *Follow-Up Alert*, 03.2017
- Medicare Advantage Plans Under Siege: Another Whistleblower Lawsuit 02.27.2017
- Is this A Result of the Affordable Care Act? *Med Monthly*, 05.30.2014
- PE Investment In NY Hospitals - The Pilot And Politics *Law360*, 03.27.2014
- Health MVP: Sheppard Mullin's Eric Klein *Law360*, 11.20.2013
- Lions and Tigers and Bears: Next Steps in the Consolidation of the California Market, *CAPG Health*, 03.2012
- PE's Healing Touch Faces Test in Hospital Buys *Law360*, 02.08.2012
- Electronic Records Mandates May Clash With Privacy Laws *The National Law Journal*, 06.08.2009

- Private Equity Funds Seek Health Care Acquisitions
The National Law Journal, 06.23.2008

Healthcare Law Blog Posts

- "Day Four Notes for the 40th Annual J.P. Morgan Healthcare Conference, 2022," January 14, 2022
- "Day Three Notes for the 40th Annual J.P. Morgan Healthcare Conference, 2022," January 13, 2022
- "Day Two Notes for the 40th Annual J.P. Morgan Healthcare Conference, 2022," January 12, 2022
- "Day One Notes for the 40th Annual J.P. Morgan Healthcare Conference, 2022," January 11, 2022
- "Day 3 Notes for the 39th Annual J.P. Morgan Healthcare Conference, 2021," January 14, 2021
- "Day 2 Notes for the 39th Annual J.P. Morgan Healthcare Conference, 2021," January 13, 2021
- "Day 1 Notes for the 39th Annual J.P. Morgan Healthcare Conference, 2021," January 12, 2021
- "Supreme Court Issues Long Awaited Ruling on Affordable Care Act Risk Corridors Program," April 27, 2020
- "Day 3 Notes at the 2020 J.P. Morgan Healthcare Conference," January 16, 2020
- "Day 2 Notes at the 2020 J.P. Morgan Healthcare Conference," January 15, 2020
- "Day 1 Notes at the 2020 J.P. Morgan Healthcare Conference," January 14, 2020
- "Notes from the 2019 Health Evolution Summit: Promoting Quality Healthcare and a Quality Healthcare Experience," April 18, 2019
- "New Regulation Clarifies DMHC's Position Regarding Knox-Keene Licensing," March 27, 2019
- "Day 3 Notes from the 2019 JP Morgan Healthcare Conference," January 10, 2019
- "Day 2 Notes from the 2019 JPMorgan Healthcare Conference," January 9, 2019
- "Day 1 Notes on the 2019 JP Morgan Healthcare Conference," January 8, 2019
- "The New California Regulatory Scheme for Pharmacy Benefit Managers," November 13, 2018
- "Day 4 Notes on the 2018 JP Morgan Healthcare Conference," January 12, 2018
- "Day 3 Notes on the 2018 JP Morgan Healthcare Conference," January 11, 2018
- "Notes on Day 2 of the JP Morgan Healthcare Conference," January 10, 2018
- "Day 1 Notes from the 2018 JP Morgan Healthcare Conference in San Francisco," January 9, 2018
- "Notes on Day 4 of the JPMorgan Healthcare Conference," January 13, 2017
- "The Old and the New – Day 3 Notes from the JP Morgan Healthcare Conference," January 12, 2017
- "Food for Thought (and Health): Day 2 Notes from the JP Morgan Healthcare Conference," January 11, 2017
- "Looking Forward/Looking Backward – Day 1 Notes from the JPMorgan Healthcare Conference," January 10, 2017
- "'May You Live in Interesting Times' – Some Healthcare Predictions for the Trump Administration's First Year," November 9, 2016
- "New Study Finds Medicare Advantage Plans Pay Lower Prices Than Traditional Medicare," August 16, 2016
- "Maryland Co-Op Claims Risk Adjustment Formula Discriminates Against Smaller Insurers," June 23, 2016
- "Mississippi Advances with Telehealth, Shows Promise for Improved Diabetes Disease Management," June 20, 2016

- "RECAP: Highlights from the Sixty-Ninth World Health Assembly in Geneva, May 23rd to 28th," June 9, 2016
- "Day Two Notes – JP Morgan Healthcare Conference, San Francisco," January 13, 2016
- "Day One Notes – JP Morgan Healthcare Conference, San Francisco," January 12, 2016
- "Federal Spotlight Continues to Shine on Physician-Owned Distributorships," January 4, 2016
- "The Next Rx: New Medicare Part D Initiative Advances Role of Medication Management in Reform," October 12, 2015
- "The Supreme Court Holds That Medicaid Providers Cannot Sue To Enforce Federal Reimbursement Rate Standards," April 16, 2015
- "Full Speed Ahead for Meaningful Use," March 24, 2015
- "Time is Running Out to Avoid the Negative Effects of 2016 Value-Based Physician Payment Modifiers: CMS Releases Results of Medicare's Value-Based Payment Modifier for 2015 as Final PQRS Participation Deadlines for 2016 Adjustments Approach," March 11, 2015
- "HHS Launches New Payment and Delivery Model to Improve Oncology Care," February 25, 2015
- "New Venture Seeks to Support Independent Physicians in Texas," February 10, 2015
- "Effects of the New Federal Spending Package on the Health Sector," December 30, 2014
- "The National Association of Insurance Commissioners Weigh in on Issues of Network Adequacy," December 1, 2014
- "CMS Grants First Waiver of Stark Law Expansion Restrictions—Are More Ahead?" November 24, 2014
- "Exploring the Relationship Between Price and Competition Among Physician Practices," October 29, 2014
- "From Competitors to Co-Adventurers, Seven Hospital Systems Join with Anthem Blue Cross to Shake Things Up in Southern California," October 13, 2014
- "\$95 Billion Savings for Medicare – A New Forecast?" September 9, 2014
- "The True Meaning of "Save Money. Live Better" – Walmart Enters the Primary Care Market," September 8, 2014
- "Pennsylvania gets a green light to pursue Medicaid expansion under an alternative model," September 5, 2014
- "Shifting to Value-Based Reimbursement," September 4, 2014
- "Nonprofit Hospital Revenue Growth Slows," September 3, 2014
- "Another Pioneer Leaves The West," September 2, 2014
- "Bundled Payments under the Affordable Care Act Continue to Gain Influence," August 8, 2014
- "Highlights from the Senate Special Committee on Aging's Hearing on Medicare Observation Status," August 6, 2014
- "Tying health spending to the economy: What does it mean for the future?" July 28, 2014
- "OIG issues Special Fraud Alert on laboratory payments to referring physicians," July 8, 2014
- "CMS seeks to update payment rates and eligibility certification requirements in proposed rule for Medicare home health services," July 7, 2014
- "A "virtual merger" is underway between Chicago-area Alexian Brothers Health System and Adventist Midwest Health," June 25, 2014

- "The Future of DSH Payments?" June 17, 2014
- "Quantifying and addressing improper payments for Medicare evaluation and management services," June 2, 2014
- "Proposed modifications to EHR Incentive Programs," May 27, 2014
- "In Michigan, CHE Trinity Health and Ascension Health Network come together in Together Health Network," May 19, 2014
- "Innovation Health: A joint venture approach to payer-provider integration in Virginia," April 28, 2014
- "Has New York State Failed its Hospitals?" April 25, 2014
- "Oscar, a new, venture-backed health insurance company, seeks to compete against industry giants," April 23, 2014
- "New Data Shows Higher Healthcare Costs in Second Half of 2013 – Is this A Result of the Affordable Care Act?" April 21, 2014
- "HHS releases new software for updating (but not replacing) HIPAA security risk assessment toolkits," April 14, 2014
- "New Approaches – and Increasing Oversight – for Medicaid Managed Long Term Services and Support," April 3, 2014
- "New York State budget negotiations contemplate private equity investment into hospitals...again," March 17, 2014
- "Colorado pilots an integrated model for the Medicare and Medicaid dual-eligible population," March 11, 2014
- "New Budget Deal Can Bring Extension of Medicare Sequestration Cuts," December 11, 2013
- "Obama Administration Delays ACA's Employer-Coverage Mandate Until 2015," July 3, 2013
- "Final Rule Implementing ACA Wellness Program Requirements Increases Financial Incentives to Participate and Allows Financial Penalties," July 3, 2013
- "Thinking Ahead - Opinions About Trends and Challenges in Today's Healthcare Industry: What Next for WellPoint After the CEO Selection?" February 15, 2013
- "Supreme Court Upholds Individual Mandate in the Affordable Care Act, but Medicaid Expansion is in Question," June 28, 2012

Media Mentions

What SB 977 could mean for PE firms investing in California's healthcare industry
PEHub, 08.27.2020

Execs emphasize diversification, not admissions, during J.P. Morgan Healthcare Conference
Modern Healthcare, 01.18.2020

To double revenue, Advocate Aurora looks to add health systems
Modern Healthcare, 01.16.2020

Deals, tech and cost-cutting at J.P. Morgan
Modern Healthcare, 01.10.2019

Rainmaker Q&A: Sheppard Mullin's Eric Klein
Law360, 10.20.2016

Land Of Lincoln Latest Co-Op Casualty As ACA Funds Stall
Law360, 07.18.2016

Health MVP: Sheppard Mullin's Eric Klein
Law360, 11.19.2015

Speaking Engagements

"Due Diligence for M&A Transactions: Purpose, Process and Practices," Online Course, July 12, 2021

"Policy Update #5: The Latest Activity in Washington and Why it Matters," Health Plan Alliance Webinar, July 21, 2020

"Accelerating Provider Alignment - New Market Models and Opportunities," Alliance of Community Health Plans Webinar, July 10, 2020

"COVID-19: After the Storm - Initial Observations for Payers," Alliance of Community Health Plans Webinar, June 6, 2020

"Policy Update #2: The Latest Activity in Washington, D.C. and Why It Matters," Health Plan Alliance, May 29, 2020

"Policy Update: The Latest Activity in Washington and Why It Matters," Health Plan Alliance Webinar, May 12, 2020

"Policy Spotlight: How the Federal and State Governments are Throwing Their Weight Around," Speaker at the Health Plan Alliance Government Programs and Risk Management, Compliance & Security Conference, August 9, 2018

"Payor Alignment Plate Tectonics – What's Shaking?," Panel speaker at the Health Evolution Summit, April 19, 2018

"Driving Value in Pharmacy: How the Industry Can and Must Deliver Change," Panel speaker at the Sheppard Mullin/Oliver Wyman webinar, October 19, 2017

"Impact of the New Administration on Health Policy," Panelist at Population Health 360: A Comprehensive Look, September 18, 2017

"Transforming Medicare Advantage into a Strategic Asset," March 16, 2017

"Risk, Growth & Aggregation: New Directions for the Market," MDS Healthcare Leadership & Executive Annual Conference, October 10, 2016

"Industry Consolidation: The Drivers and the Future," California Association of Physician Groups Annual healthcare Conference, June 18, 2016

"ACG Healthcare Panel," Moderator for Association for Corporate Growth Los Angeles, June 8, 2016

"Market Dynamics and New Transactions," Speaker at the 10th Annual MDS Healthcare Leadership and Executive Conference, October 5, 2015

"Transactions and Market Change," Speaker at the 9th Annual MDS Healthcare Leadership and Executive Conference, September 15, 2014

"Physician/Hospital Integration: What's Happening? What's Working? Will It Last?" Panel speaker at the ABA Healthcare Section - Washington Health Law Summit – December 9, 2013

"Who's Next? – Analyzing Strategic Transactions and Opportunities in Today's Market," National Accountable Care Organization Congress, November 5, 2013

"Recent Trends in Physician Alignment Transactions," Idaho Hospital Association Annual Meeting, October 6, 2013

"Changing Healthcare Landscape - A conversation on the changing forces in healthcare, their impact on providers, and strategic solution," Panel speaker at the Marsh Healthcare Summit - September 24, 2013

"Where Healthcare Reform is Really Going: Thoughts on Strategy, M&A and Survival," MDS Healthcare Leadership and Executive Conference, September 23, 2013

"Investment Opportunities in the Healthcare Reform Environment: A Case Study on Population Health Management, the Expanding Medicaid Market and Serving the Latino Healthcare Market," Panel speaker at the ACG-LA Business Conference Healthcare Panel, September 18, 2013

"Patients, Payors & Piggy Banks: Healthcare M&A in a Post-Obama Carmageddon World," ACG LA Healthcare M&A Panel, February 20, 2013

"Post-Election Healthcare Reform," Cushman Wakefield's CFO Roundtable, December 5, 2012

"Into Which Healthcare Segment is Investment Capital Going to Flow," HCE Annual Meeting, December 4, 2012

"Inside the Deals: Recent Mergers & Acquisitions in the Healthcare Industry," National Accountable Care Organization Congress, October 30, 2012

"Lions & Tigers & Bears: Next Steps in the Consolidation of the California Market," CAPG Annual Conference, May 2012

Events

National Primary Care Transformation Summit
Virtual, 07.26.2022

Healthcare M&A: Current Trends and Market Update
Webinar, 03.09.2022

Due Diligence for M&A Transactions: Purpose, Process and Practices
Online Course, 7.12.21

Healthcare Transaction Evolution and Outlook: A View Beyond the Pandemic Era
Webinar, 03.03.2021

2020 Health Care Executive Webcast Series
Webinar, September 2020 - November 2020

Vertical Integration and Value-Based Care: Will New Payer Alliances Transform Care?
Moss Adams Webcast
09.24.2020

2020 J.P. Morgan Reception
By Invitation Only
01.14.2020

Preparing for the Future of Healthcare
2019 Health Care Conference
November 7-8, 2019

Developing a Successful Global Risk Strategy Under New CMS and State Initiatives
Soundpath & GlobalMeet Webinar, 06.20.2019

Sheppard Mullin, Moss Adams and The Vancouver Clinic Webinar Discussion
What You Need to Know About the CMS Primary Care Initiative and Direct Contracting Models
GlobalMeet Webinar, 05.21.2019

Sheppard Mullin Panel Discussion Luncheon in Conjunction with the 2019 Health Evolution Summit
The Biggest Healthcare Opportunity in the Next 5 Years is....?
Ritz-Carlton Laguna Niguel, 04.11.2019

2019 J.P. Morgan Reception
By Invitation Only
01.08.2019

Healthcare Webinar
Opportunities and Pitfalls for Artificial Intelligence in Healthcare
11.12.2018

Health Plan Alliance Government Programs and Risk Management, Compliance & Security Conference
Policy Spotlight: How the Federal and State Governments are Throwing Their Weight Around
08.09.2018

2018 J.P. Morgan Reception
By Invitation Only
01.09.2018

Driving Value in Pharmacy: How the Healthcare Industry Can and Must Deliver Change
Free Webinar
via WebEx, 10.19.2017

Population Health 360 Conference
Ritz Carlton New Orleans, 09.18.2017

2017 J.P. Morgan Reception
By Invitation Only
01.10.2017

Transforming Medicare Advantage into a Strategic Asset
Sheppard Mullin New York, 11.03.2016

CAPG Annual Conference 2016: Sharing the Lessons of Innovative Payment Models
Manchester Grand Hyatt, San Diego, Spring 2016

ACG Healthcare Panel
Presented by the Association for Corporate Growth Los Angeles
The California Club, Los Angeles, 06.08.2016

2016 J.P. Morgan Healthcare Conference Reception
Hosted by Sheppard Mullin's Healthcare & Life Sciences teams and Huron Healthcare
01.12.2016

10th Annual MDS Healthcare Leadership and Executive Conference
10.2015

Healthcare Mergers & Acquisitions Forum: Taking the Temperature of the Market
Presented by Sheppard Mullin and Duff & Phelps
11.19.2014

Transforming Healthcare: Partnerships, Innovations and Population Health
9th Annual MDS Healthcare Leadership and Executive Conference
Encore Las Vegas, 09.2014

Memberships

Director, Association for Corporate Growth Los Angeles
Member, American Health Lawyers Association
Member, California Society for Healthcare Attorneys

Podcasts & Webinars

Healthcare Transaction Evolution and Outlook: A View Beyond the Pandemic Era
03.03.2021

Post-Pandemic Hospital Insolvency Risk
05.19.2020

Practices

Corporate
Mergers and Acquisitions
Healthcare
Technology Transactions
Digital Health

Industries

Emerging Company & Venture Capital
Healthcare
Life Sciences

Education

J.D., Boston University School of Law, 1985
A.B., Princeton University, 1981, *magna cum laude*

Admissions

California
U.S. District Court, Northern District of California