

## Expert Witness Retention Contract

- 1. Parties.** This contract is made between The Accident & Injury Institute (“Expert”) and CLIENT (“Client”) regarding the underlying legal matter of MATTER. Dr. Greg Hauser is an employee of Expert and acts herein only in such capacity.
- 2. Retention.** The parties agree that Expert will only become retained by Client once this contract has been mutually executed and Client has paid the initial non-refundable retention retainer specified in paragraph 4.b. Expert has no duties to Client until such time.
- 3. Expert’s Fees and Expenses.** The parties agree that the fee for all time Expert spends on the case will be compensated as outlined in the Fee Schedule below. It is agreed that this specifically includes (but is not limited to) research, conferences, consultations with Client, reviewing documents, organizing documents, analysis, testing, responding to discovery requests, report writing, investigating, reading and signing deposition transcripts, local portal-to-portal travel, waiting time, preparing exhibits, preparing demonstrative aids, and preparation time for testifying at deposition, trial, hearing, arbitration or other venues. The fee for all time Expert spends testifying will be compensated as outlined in the Fee Schedule below. Expert’s time will be tracked and invoiced to the nearest quarter of an hour. In any and all events, Client will be responsible for all reasonable out of pocket expenses including, but not limited to: travel, testing, research, copying, storage of evidence or documents, etc.
- 4. Payment Terms.**
  - a.** All payments are to be made to: **The Accident & Injury Institute  
3800 W. Ray Rd. Suite 17  
Chandler, AZ 85226**
  - Expert’s Taxpayer ID# (if applicable) is: **81-5267877**
  - b.** The *non-refundable* retention / CV / Name disclosure fee retainer amount is \$500.00. Expert will invoice against this retainer. This non-refundable retainer amount is the minimum fee due Expert and is earned upon receipt.
  - c.** Expert agrees to invoice client no less frequently than monthly.
  - d.** All invoices will be paid within 30 days - or sooner if so specified in this Contract.
  - e.** Overdue invoices will accrue interest at a rate of 1.5% per month.
  - f.** Client is responsible for collecting any and all deposition fees owed by other lawyers or parties.

- g. In the event Expert's deposition fees are reduced by court order, Client shall still pay Expert Expert's full fee specified in paragraph 3.
- h. Expert will invoice Client upon completion of Expert's report(s). All fees must be paid in full before a report is released to Client, other parties or anyone else. Expert is under no duty to release a report until Expert has been paid in full for all work performed to date.
- i. Expert will invoice Client before scheduled testimony for any outstanding fees and expenses for work performed to date. All such fees must be paid in full before Expert testifies. Expert is under no contractual duty to appear to testify and provide opinions until Expert has been paid in full for all outstanding services performed and expenses incurred on behalf of Client.

**5. Fees for Late Notice Cancellation or Rescheduling of Testimony.**

- a. Client understands that Expert will suffer damages from late notice cancellation or rescheduling of Expert's testimony and that since the precise amount of these damages would be difficult to determine, Expert shall instead be entitled to the cancellation and rescheduling fees specified in paragraphs 5.c and 5.d.
- b. The fees specified in paragraph 4.f. are 100% refundable to Client in the event Expert's scheduled testimony is cancelled or rescheduled with notice to Expert of 3 (three) or more business days.
- c. In the event Expert's scheduled testimony is cancelled or rescheduled with 1 (one) or 2 (two) business days' notice, Expert may retain a cancellation fee of 50% the amount from paragraph 4.f. The remaining amount will at Client's option be applied to future testimony or refunded to Client.
- d. In the event of same day cancellation or rescheduling of Expert's Testimony or if Expert's testimony is completed in less time than was reserved pursuant to paragraph 4.f., Expert may retain 100% of the amount specified in paragraph 4.f.
- e. In the event of any cancellation or rescheduling of testimony, Client shall be responsible for all non-refundable out of pocket travel expenses incurred by Expert such as airline tickets and hotel rooms.

**6. Duties of Client.** The Client's duties specifically include, but are not limited to:

- a. Abiding by the applicable rules of professional conduct for attorneys.
- b. Making all payments as specified in Paragraphs 4 and 5 under the terms as specified in Paragraphs 4 and 5.
- c. Providing Expert with copies of or access to all non-privileged, arguably relevant documents, evidence and other materials in the underlying legal matter.

- d. Notifying Expert of all parties and attorneys in the case so that Expert can check for conflicts of interest.
- e. Where circumstances reasonably allow, providing Expert with prompt notice of any *Daubert* motions, *Frye* motions, motions in limine, or other pre-trial motions made by other parties or persons to restrict, exclude or in any way limit Expert's testimony or Expert's participation in the underlying legal matter.
- f. Obtaining Expert's advance approval (for accuracy) of the relevant portions of any and all answers to interrogatories, motions, expert designations or other documents which summarize Expert's qualifications, methodology, opinion(s) and/or anticipated testimony.
- g. Being available as reasonably requested to meet with Expert prior to anticipated testimony.
- h. Promptly notifying Expert of when and where Expert may be requested to appear to testify.
- i. Promptly notifying Expert of any issues related to paragraph 8.b. to which Client is or becomes aware of.
- j. Promptly notifying Expert of the settlement or final adjudication of the underlying legal matter.

**7. Duties of Expert.** The Expert's duties are:

- a. To truthfully represent Expert's credentials.
- b. To formulate with honesty and due care and truthfully express Expert's opinion(s) in those areas (and only those areas) where Expert feels qualified to render an opinion and where Client has requested an opinion. Client agrees that Expert's opinion(s) are not preordained, might be contrary to Client's position, and are subject to modification as a result of new or additional information.
- c. To cease work on the underlying legal matter and promptly inform Client whenever Expert has accrued unpaid fees and expenses totaling more than \$1000.00. In this event, Expert shall not perform further work on the underlying legal matter until approval is given by Client.
- d. Expert is under no duty to provide and express opinions if Expert is given time deadlines or cost-based or other restrictions by Client that would not reasonably allow Expert to in good faith formulate and express his opinions with reasonable care.
- e. Subject to paragraph 7.d., to prepare a written report if Client requests one.
- f. Subject to paragraph 7.d. and to circumstances beyond the Expert's control, to meet all reasonable deadlines requested by Client.
- g. To retain and preserve (during this engagement) all evidence provided to Expert from the underlying legal matter unless Client gives written permission for destructive testing or the like.
- h. To be available on reasonable notice to testify.
- i. To be available on reasonable notice to consult with Client. Expert's cellular number is 602-463-4541.



**14. Miscellaneous.** Each party agrees that it may not assign its interest, rights or duties under this Contract to any other person or entity without the other party's prior approval. (Expert is under no duty to work for successor law firms on the underlying legal matter.) The performance of this contract by either party is subject to acts of God, death, disability, government authority, disaster or other emergencies, any of which make it illegal or impossible to carry out the agreement. It is provided that this contract may be terminated for any one or more of such reasons by written notice from one party to the other without liability. If either party agrees to waive its right to enforce any term of this contract, it does not waive its right to enforce any other terms of this contract. This written contract represents the entire understanding between the Expert and Client. The individual signing this contract on behalf of Client represents and warrants that he/she is duly authorized to bind Client.

**15. Additional Provisions (check all those that apply).**

- a.  **Expert Unavailable** Notwithstanding Paragraph 7 Expert is unavailable to perform obligations under this contract during the following time frame(s):

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- b.  **Business Class Flights.** Notwithstanding paragraph 12, all flights taken by Expert longer than 3 hours shall be by business class, or first class if business class is unavailable.

- c.  **Split Hourly Rate.** Notwithstanding paragraph 3, the hourly rate for

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\_\_\_\_\_ shall be \$ \_\_\_\_\_ /hr.

- d.  **Scope of Work.** Client is requesting an opinion in the following area(s):

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- e.  **Additional terms are attached to this contract as "Appendix A."**

- f.  **The following additional terms apply:**

i.  \_\_\_\_\_

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ii.  \_\_\_\_\_

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iii.  \_\_\_\_\_

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<b>FEE SCHEDULE</b>	
Retainer, non-refundable, minimum fee	\$500.00
Non-Refundable CV / Name disclosure fee (included in retainer)	\$500.00
All work done (hour increments)	\$325.00 / hour
Initial Reports usual cost	\$500.00 - \$2000.00
Non-working travel time	\$150.00 / hour
Appearance i.e.(Deposition / Trial etc.) at 2 times base rate (2 hour minimum, paid prior)	\$650.00 / hour
Cancelation must be made 72 hours prior or full fee is payable	
Coach class (Y) for direct non-stop air travel, plus all other usual and customary expenses	Actual cost

Fees for any time Expert is asked to reserve for testifying (at trial, hearing, deposition, arbitration or other venue) and preparation for said testimony must be paid in advance and in full 5 (five) business days prior to the time reserved for the scheduled testimony. Expert is under no contractual obligation to reserve the time or appear to testify and provide opinions unless Expert has received this payment in full at least 5 (five) business days prior to the time reserved for the scheduled testimony.

**Payment Terms.**

All payments are to be made to:

**The Accident & Injury Institute  
 3800 W. Ray Rd. Suite 17  
 Chandler, AZ 85226**

Expert's Taxpayer ID# is:

**81-5267877**

EXPERT, by

Greg A. Hauser

Print Name



Signature

Date: 11 September 2021

CLIENT, by

\_\_\_\_\_

Print Name

\_\_\_\_\_

Signature

Date: \_\_\_\_\_