

Retention Agreement & Fee Sheet

Hourly Rates

John O. Ward, PhD	\$600
William H. Rogers, PhD	\$500
Economist	\$400
Specialists	\$250

Testimony & Travel Terms

- In-Person Deposition:** No retainer required. All in-person testimony for Dr. Rogers is scheduled at an agreeable Saint Louis metropolitan location. Invoiced at a **three-hour minimum** or actual portal-to-portal time from his Saint Charles location (including wait time), whichever is greater.
- Virtual Deposition:** No retainer required. Invoiced at a **one-hour minimum** or actual deposition length, whichever is greater.
- Trial Testimony:** Requires a **Trial Retainer**. In-person trial testimony is invoiced at expected portal-to-portal time from our office location against a minimum pre-paid retainer. Virtual trial testimony is invoiced at a **one-hour minimum** or actual trial length, whichever is greater.
- Preparation & Expenses:** Testimony preparation is invoiced at hourly rates and based on case complexity. Lodging and airfare will be purchased at fully refundable rates and invoiced at cost.
- Canceled Testimony:** If canceled within **two weeks**, a one-hour minimum or actual prep time is invoiced. If canceled after a non-refundable deadline, all incurred expenses (e.g. lodging/travel) will be invoiced to the retaining attorney.
- Daily Cap:** Fees for consulting, testimony, and travel are capped at **12 hours per day**.

General Terms & Disclosures

- Payments & Financial Responsibility:** The case-appropriate retainer or fee must be submitted with the requested case information. Payments may be made via check, ACH, Visa, MC, or AMEX. All invoices are Net 30.
- ♦ **Retainer Refunds:** In the event a retainer is refunded (e.g., due to trial cancellation), the amount returned will be **net of any third-party transaction fees** incurred by John Ward Economics, LLC during the initial receipt of payment (e.g., credit card merchant fees).
- ♦ **Third-Party Billing:** While John Ward Economics, LLC may accommodate requests to invoice third parties (e.g., opposing counsel for deposition testimony), the **Retaining Attorney/Firm remains ultimately responsible** for all fees and expenses incurred. By signing this agreement, the Retaining Attorney agrees that if a third party fails to remit payment within the specified terms, the Retaining Attorney will accept liability for the outstanding balance and will utilize their authority to ensure immediate payment is made.
- Late Fees:** All deposition invoices are Net 30. A **1.5% service charge** is added 7 days after the due date and every month thereafter.
- AI Data Processing:** John Ward Economics, LLC utilizes **Gemini** within a **Workplace Enterprise Plus HIPAA-compliant platform**. This secure environment allows us to organize and manage materials with increased efficiency while maintaining strict data privacy. Data processed through this enterprise platform is not used to train public models.
- Disclosure Requirement:** A signed Retention Agreement and Retainer Fee must be received before any expert from John Ward Economics can be disclosed in your case. We will not provide completed reports or testimony if there are unpaid balances.

Agreement & Signature

I have read and agree to the terms of this document:

Retaining Law Firm (Print Name)

Client or Case Name

Retaining Attorney (Print Name)

Retaining Attorney Signature

Date

Retainers & Fees*

☐ Base Fee (Non-refundable portion for all work)	\$1,750
☐ Stand-Alone Reports Life Care Plan, Household Services, and Basic Present Value (Data entry and interview time charged at the Specialists rate in addition to the base fee)	\$1,750
☐ Personal Injury Report (Life Care Plan data entry charged at the Specialists rate in addition to the fee)	\$5,250
☐ Wrongful Death Report	\$5,250
☐ Missouri Statutory Wrongful Death, Minor Child, Homemaker or Care Provider	\$3,250
☐ Employment Termination/Loss, Discrimination	\$4,000
☐ Commercial Damages or Class Action (Hours charged at the appropriate hourly rate)	\$17,500 (Retainer)

All Report Updates

(Hours charged at the appropriate hourly rate)

*Unless otherwise agreed

Litigation Case Contact Information Sheet

- 1 Litigation Case Caption:** If the litigation matter has been filed with a court, please provide the case caption information for our records. ☐ Check here if "expected" court jurisdiction, not filed.

Court Jurisdiction or expected venue

Plaintiff

Defendant

Case Number

- 2 Representation:** Do you represent the plaintiff or defendant? ☐ Plaintiff ☐ Defendant

- 3 Attorney Contact information:**

Attorney Name, Firm Name & Address

Attorney Email Address

Attorney Telephone & Fax Number

- 4 Attorney's Paralegal:**

Paralegal's Name

Paralegal's Email Address

- 5 Other experts retained in this case impacting economic damages:**

☐ Vocational expert

☐ Life Care Planner

☐ Accountant

☐ Psychologist/Psychiatrist

☐ Physician

☐ Other _____

Wrongful Death Questionnaire Minor Child

This questionnaire is to be filled out by one or more of the following persons: the parents of the decedent, a representing sibling or guardian of the decedent, and/or legal counsel. The economists at John Ward Economics will use the information supplied in this questionnaire as a basis for their economic loss estimates. Please fill out the sections of the questionnaire that are relevant to the decedent's personal history. An economic expert from John Ward Economics will likely contact the surviving parent(s), the representing sibling or guardian, or legal counsel in order to discuss the answers provided and address any remaining questions or issues. If you run out of space within the forms, the last page of the questionnaire has blank space to use as needed.



If you use free Adobe Acrobat Reader Version 11 and above, you can use the "Add Text Comment" tool to fill out this questionnaire electronically and then save your typewritten answers in the PDF format for printing, emailing, storage, etc. (see <http://get.adobe.com/reader/>).

Please print your answers clearly and mark boxes with an X or a checkmark such as ☒.

Staff members at John Ward Economics can be reached at the telephone number and email address above. Please contact us for answers about any questions you might have when filling out the questionnaire. Our regular office hours are Monday through Friday, 9 a.m. to 4:30 p.m. CST.

Start Here



Please print the decedent's name, city and state where lived, telephone number of the survivor to contact for additional information, and the name of the representing attorney.

Decedent's name

City and state where the decedent lived

Telephone number(s) that John Ward Economics can use to contact the decedent's survivor.

Name of the attorney representing the decedent's survivor(s)

Decedent's basic demographic data

1 What is the decedent's name? (Please print)

First and last name

2 What was the decedent's sex? (Mark a box)☐

Male

☐

Female

3 What was the decedent's date of birth? (Use numbers for MM DD YYYY)

Month

Day

Year

4 What was the decedent's race? (Mark one box or specify in the blank box)☐

White

☐

Black

☐

Hispanic

☐

Asian

Other race

5 What was the decedent's U.S. citizenship status? (Mark one box; if other, specify residency status)☐

Citizen

☐

Visa

Other

6 What was the decedent's highest educational attainment? (Mark one box for highest attained)☐

Pre-K

☐Kinder-
garten☐

1st grade

☐2nd
grade☐

3rd grade

☐

4th grade

☐

5th grade

☐

6th grade

☐

7th grade

☐

8th grade

☐

9th grade

☐

10th grade

☐11th
grade☐12th, no
diploma☐

GED

☐High
school☐Trade
school☐Some
college**7** What are the names of the decedent's surviving mother and father? (Please print)

Mother's first and last name

Father's first and last name

8 What are the surviving parents' dates of birth? (Use numbers for MM DD YYYY)

Mother Month

Mother Day

Mother Year

Father Month

Father Day

Father Year

9 What is the mother's race? (Mark one box or specify other race in the blank box)☐

White

☐

Black

☐

Hispanic

☐

Asian

Other race

10 What is the father's race? (Mark one box or specify other race in the blank box)☐

White

☐

Black

☐

Hispanic

☐

Asian

Other race

Decedent's parents data

11 What was the decedent's mother's highest educational attainment? (Mark one box for highest attained)

☐ 7th grade or less	☐ 8th grade	☐ 9th grade	☐ 10th grade	☐ 11th grade	☐ 12th grade, no diploma
☐ GED	☐ High school	☐ Trade school	☐ Some college	☐ Associate degree	☐ Bachelor degree
☐ Masters	☐ JD	☐ PhD or EdD	☐ DDS or OD	☐ MD or DO	☐ Other

12 What was the decedent's father's highest educational attainment? (Mark one box for highest attained)

☐ 7th grade or less	☐ 8th grade	☐ 9th grade	☐ 10th grade	☐ 11th grade	☐ 12th grade, no diploma
☐ GED	☐ High school	☐ Trade school	☐ Some college	☐ Associate degree	☐ Bachelor degree
☐ Masters	☐ JD	☐ PhD or EdD	☐ DDS or OD	☐ MD or DO	☐ Other

13 What is the mother's occupation? (Please print)

Occupation of mother

14 What is the father's occupation? (Please print)

Occupation of father

15 If the surviving family owns a business or farm that the child was expected to participate in, please describe the business or farm and the expected role the child would have played, if any.

Description of family business or farm and expected role of child

16 On what date did the death occur? (Use numbers for MM DD YYYY)

Month	Day	Year

[illegible]

18 Did the decedent have any persistent medical or physical conditions that would have limited the kind or amount of work that they could have performed? (If Yes, please describe)

☐ NO ☐ YES →	If yes, please describe
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19 Describe any educational pursuits of the decedent. (Indicate any education plans for the decedent)

Case No.	Case Name	Case Type	Case Status	Case Date	Case Location	Case Description	Case Notes	Case Attachments
1	John Doe	Medical	Open	2023-01-01	New York	John Doe, 35 years old, male, reported a severe headache and dizziness on January 1, 2023. He was taken to the hospital and diagnosed with a migraine. He was prescribed medication and is currently recovering.	John Doe has a history of migraines. He was prescribed ibuprofen and acetaminophen. He is currently recovering and is able to return to work.	John Doe's medical records, including a copy of his prescription and a copy of his discharge summary.
2	Jane Smith	Medical	Open	2023-01-02	New York	Jane Smith, 45 years old, female, reported a severe headache and dizziness on January 2, 2023. She was taken to the hospital and diagnosed with a migraine. She was prescribed medication and is currently recovering.	Jane Smith has a history of migraines. She was prescribed ibuprofen and acetaminophen. She is currently recovering and is able to return to work.	Jane Smith's medical records, including a copy of her prescription and a copy of her discharge summary.
3	John Doe	Medical	Open	2023-01-03	New York	John Doe, 35 years old, male, reported a severe headache and dizziness on January 3, 2023. He was taken to the hospital and diagnosed with a migraine. He was prescribed medication and is currently recovering.	John Doe has a history of migraines. He was prescribed ibuprofen and acetaminophen. He is currently recovering and is able to return to work.	John Doe's medical records, including a copy of his prescription and a copy of his discharge summary.
4	Jane Smith	Medical	Open	2023-01-04	New York	Jane Smith, 45 years old, female, reported a severe headache and dizziness on January 4, 2023. She was taken to the hospital and diagnosed with a migraine. She was prescribed medication and is currently recovering.	Jane Smith has a history of migraines. She was prescribed ibuprofen and acetaminophen. She is currently recovering and is able to return to work.	Jane Smith's medical records, including a copy of her prescription and a copy of her discharge summary.
5	John Doe	Medical	Open	2023-01-05	New York	John Doe, 35 years old, male, reported a severe headache and dizziness on January 5, 2023. He was taken to the hospital and diagnosed with a migraine. He was prescribed medication and is currently recovering.	John Doe has a history of migraines. He was prescribed ibuprofen and acetaminophen. He is currently recovering and is able to return to work.	John Doe's medical records, including a copy of his prescription and a copy of his discharge summary.
6	Jane Smith	Medical	Open	2023-01-06	New York	Jane Smith, 45 years old, female, reported a severe headache and dizziness on January 6, 2023. She was taken to the hospital and diagnosed with a migraine. She was prescribed medication and is currently recovering.	Jane Smith has a history of migraines. She was prescribed ibuprofen and acetaminophen. She is currently recovering and is able to return to work.	Jane Smith's medical records, including a copy of her prescription and a copy of her discharge summary.
7	John Doe	Medical	Open	2023-01-07	New York	John Doe, 35 years old, male, reported a severe headache and dizziness on January 7, 2023. He was taken to the hospital and diagnosed with a migraine. He was prescribed medication and is currently recovering.	John Doe has a history of migraines. He was prescribed ibuprofen and acetaminophen. He is currently recovering and is able to return to work.	John Doe's medical records, including a copy of his prescription and a copy of his discharge summary.
8	Jane Smith	Medical	Open	2023-01-08	New York	Jane Smith, 45 years old, female, reported a severe headache and dizziness on January 8, 2023. She was taken to the hospital and diagnosed with a migraine. She was prescribed medication and is currently recovering.	Jane Smith has a history of migraines. She was prescribed ibuprofen and acetaminophen. She is currently recovering and is able to return to work.	Jane Smith's medical records, including a copy of her prescription and a copy of her discharge summary.
9	John Doe	Medical	Open	2023-01-09	New York	John Doe, 35 years old, male, reported a severe headache and dizziness on January 9, 2023. He was taken to the hospital and diagnosed with a migraine. He was prescribed medication and is currently recovering.	John Doe has a history of migraines. He was prescribed ibuprofen and acetaminophen. He is currently recovering and is able to return to work.	John Doe's medical records, including a copy of his prescription and a copy of his discharge summary.
10	Jane Smith	Medical	Open	2023-01-10	New York	Jane Smith, 45 years old, female, reported a severe headache and dizziness on January 10, 2023. She was taken to the hospital and diagnosed with a migraine. She was prescribed medication and is currently recovering.	Jane Smith has a history of migraines. She was prescribed ibuprofen and acetaminophen. She is currently recovering and is able to return to work.	Jane Smith's medical records, including a copy of her prescription and a copy of her discharge summary.

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Indicate other information not covered elsewhere in the questionnaire or use this area for extra space.
(When using for extra space, please refer to a question number)

Additional information

Additional information

End Here