

STEPHANIE SESSIONS PERKINS

SUMMARY OF QUALIFICATIONS

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Solutions focused and highly accomplished educator, senior attorney and firm managing shareholder. Extensive civil litigation and business advisory and transactional experience. Management of complex business, commercial, professional liability, and employment matters, as well as transaction-related advisory services; estate and trust related planning. Broad experience providing strategic advice to management clients, as well as rendering organizational risk management, loss prevention, operational and human resource management advisory services. Knowledgeable of and experienced in drafting and evaluating employment, non-compete, separation agreements and other core business contracts. Chief Risk and Legal Officer to national CPA firm. Over 15 years as Senior Counsel with international CPA firm and in-house legal advisor to national insurance company, developing and implementing strategic customer service goals, providing risk management and legal representation to insureds including in civil, regulatory, and licensing matters; and strategic partner for successful defense of complex litigated professional liability matters. Currently professor of ethics, legal issues in business and negotiation skills for management for graduate and undergraduate university studies.

Exceptional negotiation, diplomacy, and team-building skills. Organized, disciplined and self-directed. A skilled communicator able to analyze, synthesize and deliver complex information to diverse work groups. Effective management, oversight, and training of professional, executive, and administrative personnel in multi-office and remote work environments. Professional educator; continuing education for professionals; guest lecturer. Excellent writing, and presentation skills.

INSTRUCTIONAL EXPERIENCE

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- **Part-Time Faculty—California State University, Sacramento: College of Business Undergraduate Studies** 2015- present
  - **EMBA, IMBA Programs; Mgt 117; ACCY 132; HROB 153; MBA 232; MBA 203; MBA 201; MGMT 10; MGMT 102**
- **Guest Lecturer—University of California, Davis, Masters in Accountancy** 2014-present
- **Frequent Speaker and Webinar Instructor—**
  - **CalCPA Education Foundation** 1995-present
  - **National Judicial College** 2010-2016
  - **Private organizational leadership and risk management training** 1995-present
  - **Louisiana, Georgia, and Washington Society of CPAs** various
  - **In-house risk management, best practices; business writing, ethics and employment relations, management, and liability issues** various

**PROFESSIONAL EXPERIENCE**

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**June 2022—Present.**                      **Macias Gini & O’Connell, CPAs**                      **Nationwide**  
***Chief Risk and Legal Officer***

- Responsible for assessing and providing guidance to leadership in mitigating competitive, regulatory, personnel and technological threats.
- Responsible for active oversight of claims and high-risk matters; transactional matters; merger and acquisition due diligence and related negotiations and transition; advisory, professional licensing and regulatory services, advising and representation of firm. Business and employment related ADR and litigation handling and management.
- Oversight of outside counsel.

**2016-Present.**                      **Perkins Law Group, A Professional Corporation**                      **Statewide CA**  
***Managing Shareholder***

- Managing Partner of law firm with offices in Northern and Southern California.
- Responsible for active caseload; transactional matters; merger and acquisition due diligence and related negotiations and transition; organizational on-call general counsel for various clients as well risk management, advisory, professional licensing and regulatory services, advising and representation. Business and employment related litigation.
- On-call General Counsel for organizational clients. Transactional, risk management, business advisory and employment matters.
- Oversight of associate attorneys’ professional development, and client and case management.
- Frequent speaker and continuing professional education instructor, including American Institute of Certified Public Accountants (including education and training of judiciary); California Society of CPAs risk management and employment practices.

***Core Specializations***

- Representing professional service organizations and industry management in professional liability, commercial business liability and advisory services matters as well as all aspects of employments practices and personnel management.
- Implementation of contract terms and drafting core business and employment related agreements; vendor agreements.
- Strategic advising to management.
- Business litigation and mediation, including complex partner/shareholder disputes.
- Counseling and training clients for purposes of developing effective and sustainable loss prevention strategies.
- In-house risk management assessments, audits, and investigations.
- Professional licensing and regulatory defense, including PCAOB, SEC, DOL, AICPA and various state Boards of Accountancy for CPA firms and individual CPAs (nationally).
- Cyber-liability assessment and consulting.
- Business planning.
- Estate and Trust practice.

## STEPHANIE SESSIONS PERKINS—CURRICULUM VITAE

**2021-Present. MarQueen Incorporated**  
**Chief Executive Officer and Legal Counsel**

**Upland CA**

**Core Specializations**

- Overseeing executive leadership, public relations of the company and all company related training and growth
- Overseeing risk management and legal matters
- Overseeing Board of Directors

**Chapman, Glucksman, Dean, Roeb & Barger, LLP**

**Statewide—CA**

**Partner**

- Managing partner of Sacramento area office for regional law firm.
- Responsible for active caseload and client portfolio.
- Business risk management and advisory services. Sizeable portion of practice devoted to assisting clients in developing loss prevention strategies, advisory services, risk management assessments and managing the day-to-day issues related to the operation of the clients' business or practice.
- Specialized in representing a wide variety of business clients including accounting firms and industry in matters involving professional liability, employment practices and commercial business advising, disputes, litigation, and cyber-liability defense.
- Counseling and training clients for purposes of developing effective and sustainable loss prevention strategies. In-house risk management assessments, audits, and investigations.
- Professional licensing and regulatory defense, including PCAOB, SEC, DOL, AICPA and various state Boards of Accountancy for CPA firms and individual CPAs (nationally).
- Active participant in mentoring and training of junior associates.
- Frequent speaker and continuing professional education instructor, including American Institute of Certified Public Accountants (including education and training of judiciary), California Society of CPAs risk management and employment practices.

**CAMICO Mutual Insurance Company**

**Nationwide**

**Legal Counsel and Legal Services Manager**

- Rendered legal services and consultation to national insurance company's insureds nationwide in the areas of professional liability and employment practices. Practice and risk management advice/risk assessment, providing representation in pre-claim/high risk matters including regulatory investigations and subpoenas as well as advice on adherence to professional standards.
- Served claims department management by providing advice, development, oversight, and management of litigation strategy in complex and/or high exposure cases. Analysis and resolution of coverage issues. Extensive mediation practice.
- Assisted with claims department process improvement, policy development. Managed special projects; assisted in development and implementation of internal claims practices and procedures, practice tools and models for use by the claims department specialists; defense counsel guidelines, personnel training.
- Frequent speaker and trainer—developed and delivered program materials for external customer presentations and in-house education. Course instructor for California Society of CPAs Employment Practices 8-hour courses and Risk Management and Writing Training for CPAs.

## STEPHANIE SESSIONS PERKINS—CURRICULUM VITAE

- Successfully served as Legal Services Manager, managing remote Legal Service Unit (LSU) and its staff. Responsible for LSU operations and services to national customer base improving customer service and reducing reliance on defense panel counsel. Managed LSU budget. Facilitated company development of rapport with and oversight of outside defense counsel through national expansion phase to present. Instrumental in relationship building between company claims department and loss prevention department personnel. Successfully assisted in smooth integration of the Legal Service Unit functions into the Claims Department following national expansion.

### **Ernst & Young, LLP**

**Nationwide**

#### **Senior Counsel -- Office of the General Counsel**

- Extensive hands-on litigation experience. Managed diverse and complex business litigation/professional liability and employment related actions and disputes in Federal and State Courts. Represented firm in jury trials, court trials and mediations. Served as advisor to firm management, partner groups and personnel regarding risk management, employment practices and practice improvement issues including regulatory and licensing matters. Directed outside counsel in management of litigation.
- Frequent speaker and in-house educator, developing and delivering educational program materials. Panel speaker.

Served as liaison to the California Society of CPAs government relations committee, actively participating in tort reform initiatives and lobbying efforts.

## **EDUCATION**

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### **Loyola Law School**

Los Angeles, CA

J.D.

- Honors Moot Court Participant
- Volunteer Western Law Center for the Disabled

### **California Polytechnic State University**

San Luis Obispo, CA

*B.A. in English with emphasis in literature*

Cum Laude

*Linguistics TA*

## **PROFESSIONAL MEMBERSHIPS AND BOARD POSITIONS**

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### **California Bar—Member in Good Standing since admission—Current Member**

American Bar Association—Current Member

➤ ABA, Professional Liability Committee—Current Member

Association of Defense Counsel (North and South)—Current Member

Women Lawyers of Sacramento—Current Member

California Society of CPA, Employment Practices Committee Member—Past Member

California Society of CPA, Government Relations Committee Member—Past Member (application for current admission pending)

Paradise Oaks Youth Services—Past Board Member--2020

Friends of the Crisis Nurseries—Past Board Member--2019