

Claimant Info Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | |
|------------------------|--------------------|
| Plaintiff Name | R. Emerson Lee |
| Address 1 | 121 S. Lawrence St |
| Address 2 | |
| City | Cabot |
| State | NC |
| Zip | 12023 |
| E-Mail Address | |
| Phone | 910.555.8161 |
| Fax | |
| SSN | 232-88-1232 |
| Gender | M |
| Race | W |
| Date of Birth | 3/16/1963 |
| Life Expectancy | |
| Work Expectancy | |
| Contact Name | |
| Contact Address 1 | |
| Contact Address 2 | |
| Contact City | |
| Contact State | |
| Contact Zip | |
| Contact E-Mail Address | |
| Contact Phone | |
| Contact Fax | |

Memo:

R. Emerson Lee was referred to us by our client, Susan Jones. Mr. Lee is Susan's brother in Law. Mr. Lee is seriously injured and will not be able to work a full time job for the rest of his life.

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Case Info Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | |
|--|---|
| Case Name | R. Emerson Lee vs. Rogers & Johnson Trucking and Bill Planter |
| Court Case/Docket Number | CV-20131821 |
| Firm File Number | 13-1261 |
| Plaintiff | R. Emerson Lee |
| Defendant | Rogers & Johnson Trucking, Bill Planter |
| Judge | The Honorable James Watson |
| Incident Date | 2/1/2012 |
| Case Opening Date | 5/12/2012 |
| Number of Insurance Companies involved | 1 |
| Number of Opposing Law Firms involved | 0 |
| Insurance Company 1 | Stonewall Insurance |
| Insurance Address 1 | 100 22nd Street Towers |
| Insurance City | New York |
| Insurance State | NY |
| Insurance Zip | 11222 |
| Insurance Main Phone | 232-555-6185 |
| Insurance Website | www.stonewallins.com |
| Insurance Adjuster Name | Dewey Cheatum |
| Insurance Adjuster E-Mail Address | dcheatum@stonewallins.com |
| Insurance Adjuster Direct Phone | 232-555-5816 |

Memo:

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Case Info Report

Dewey, Cheatham, & Howe, PLLC

Claimant:

Attorney: Lester (Les) Worthy

R. Emerson Lee

Accident Type: Traffic accident, Rear ended by a Semi on I-220 outside Raleigh, NC.

Injuries Include: bilateral femur fractures, hip and ankle fractures, concussion, and fracture of the C2 vertebrae.

Treatment/Services: Patient was transported by ambulance from scene to St. John's ER where he was stabilized and placed in a halo for C2, 3 stabilization. Orthopedic surgery was performed for femur fractures, hip and ankle fractures. Following ICU and floor recovery time, patient was transported to Jenkins Rehabilitation Center for in house rehab services (duration 15 days). Patient then followed up with renowned spinal surgeon Dr. Charles Peek in Memphis, TN. Dr. Peek performed stabilization/fusion surgery on vertebrae C2 and C3. Following this surgery and in house recovery time, patient was transported to in-house rehabilitation center for 1 days of rehab service. Patient had follow up appointments 1 week, 2 weeks, and 6 weeks post op. Patient had out patient PT three times a week for 2 weeks, twice a week for 2 weeks, and then once a week for 2 weeks.

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Medical Expenses Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | |
|---|----------------------|
| Total Billed by all Medical Providers: | \$56,068.65 |
| Total Paid by all Medical Providers: | (\$21,236.55) |
| Total Due to all Medical Providers: | \$11,155.05 |

| <u>Medical Provider</u> | <u>Int Provider Description</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
|--|---------------------------------|---------------------|---------------------|------------------|
| Dr. Don Brown | Orthopedic Surgeon | \$3,130.00 | (\$2,556.51) | \$133.03 |
| <i>Nego\$ Date: 08/15/2012 Contact: Dr. Brown agreed to \$0 on the bill Staff: LAG 0%) \$0.00</i> | | | | |

| <u>Medical Provider</u> | <u>Int Provider Description</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
|---|---------------------------------|--|----------------------------|----------------------|
| Dr. Charles Peek | Spinal Surgeon | \$1,125.00 | (\$6,212.00) | \$1,333.00 |
| <u>Statement Date</u> | <u>Statement #</u> | <u>Statement Description</u> | <u>Doc</u> | <u>Billed</u> |
| 05/22/2012 | 8856250 | | ✓ | \$1,125.00 |
| <u>Service Date</u> | <u>Service Type</u> | <u>Service Description</u> | | <u>Amount Billed</u> |
| 03/02/2012 | Treatment | Pre-Op Consultation | | \$85.00 |
| 03/03/2012 | Treatment | Stabilization/fusion surgery on vertebrae C2 | | \$1,250.00 |
| 03/11/2012 | Treatment | Post-Op visit 2 Wks | | \$85.00 |
| 02/12/2012 | Treatment | Post-Op visit 6 Wks | | \$85.00 |
| <i>Unassigned dollar amount from this statement</i> | | | | \$0.00 |
| <u>Payment Date</u> | <u>Subro Source</u> | <u>Remittance #</u> | <u>Payment Description</u> | <u>Adi</u> |
| 06/15/2012 | BSMS Insurance | 22355 | | |
| 06/15/2012 | BSMS Insurance | 22355 | | |
| | | | | <u>Paid</u> |
| | | | | (\$6,122.00) |
| | | | | (\$210.00) |
| | | | | <u>Due</u> |
| | | | | \$1,333.00 |
| | | | | <u>Doc Trip</u> |
| | | | | Trip 2 |

| <u>Medical Provider</u> | <u>Int Provider Description</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
|-------------------------------|---------------------------------|---------------------|---------------------|------------------|
| Griffin Anesthesiology | Anesthesiologist | \$1,282.50 | (\$1,021.52) | \$256.58 |

| <u>Medical Provider</u> | <u>Int Provider Description</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
|-------------------------------|---------------------------------|---------------------|-------------------|-------------------|
| Jenkins Rehabilitation | Rehab | \$3,315.00 | \$0.00 | \$3,315.00 |

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Medical Expenses Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

MP Lien: 06/11/2012 Lien for full amount of patient bill \$3,315.00

| <u>Medical Provider</u> | <u>Int</u> | <u>Provider Description</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
|--------------------------|------------|-----------------------------|---------------------|-------------------|------------------|
| Johnson Radiology Clinic | | Radiology | \$250.00 | (\$360.00) | \$50.00 |
| Lawrence Christopher - | | Hospital | \$21,082.56 | (\$11,205.33) | \$3,815.63 |
| Tad's Pharmacy | | Pharmacy | \$656.23 | (\$516.23) | \$120.00 |
| UTMS Hospital | | Hospital | \$12,222.00 | (\$11,165.58) | \$2,652.02 |
| ABC Ambulance Service | | Ambulance | \$513.50 | \$0.00 | \$513.50 |
| Blackwell and Finch | | Physical Therapy | \$1,020.00 | (\$60.00) | \$560.00 |
| Douglas Anesthesiology | | Anesthesiology | \$1,282.50 | (\$1,021.52) | \$256.58 |

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Medical Treatment Timeline

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| <u>Service Date</u> | <u>Medical Provider</u> | <u>Service Description</u> | <u>Statement Date</u> | <u>Statement #</u> |
|---------------------|-------------------------------|---|-----------------------|--------------------|
| 02/01/2012 | Johnson Radiology Clinic | MRI Xray Evaluation | 02/22/2012 | 8862850 |
| 02/01/2012 | Lawrence Christopher - St. | ER Services | 02/15/2012 | |
| 02/01/2012 | Dr. Don Brown | Orthopedic surgery on R hip, R femur, & R ankle | 02/11/2012 | 585562 |
| 02/01/2012 | Griffin Anesthesiology | Surgical Anesthesia | 02/12/2012 | RSMI55830 |
| 02/01/2012 | ABC Ambulance Service | Stabilize & emergency transport | 02/01/2012 | |
| 02/16/2012 | Dr. Don Brown | X-Rays | 02/11/2012 | 585562 |
| 02/16/2012 | Dr. Don Brown | Post-Op Office Visit | 02/11/2012 | 585562 |
| 03/02/2012 | Dr. Charles Peek | Pre-Op Consultation | 05/22/2012 | 8856250 |
| 03/02/2012 | Jenkins Rehabilitation Center | | 02/10/2012 | 22165 |
| 03/03/2012 | Douglas Anesthesiology | Surgical Anesthesia | 02/02/2012 | |
| 03/03/2012 | Dr. Charles Peek | Stabilization/fusion surgery on vertebrae C2 and C3 | 05/22/2012 | 8856250 |
| 03/11/2012 | Dr. Charles Peek | Post-Op visit 2 Wks | 05/22/2012 | 8856250 |
| 02/11/2012 | Tad's Pharmacy | Pain Meds | 05/02/2012 | 6212222 |
| 02/12/2012 | Dr. Charles Peek | Post-Op visit 6 Wks | 05/22/2012 | 8856250 |
| 02/25/2012 | Blackwell and Finch Physical | Physical Therapy | 05/02/2012 | 23018861 |

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Subrogation Payments Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | |
|---|----------------------|
| Total Subro Payments and Adjustments: | (\$21,236.55) |
| Adjustments to Medical Provider Statements: | (\$2,018.35) |
| Total Paid by all Subro Sources (not including Adjustments): | (\$31,358.20) |

| <u>Subrogation Source</u> | <u>Int</u> <u>Subro Source Description</u> | <u>Total Paid</u> |
|---------------------------|--|-------------------|
| Claimant | | \$0 |

| <u>Subrogation Source</u> | <u>Int</u> <u>Subro Source Description</u> | <u>Total Paid</u> |
|---|--|-------------------------------|
| BSMS Insurance | Private Health Ins | (\$31,358.20) |
| <u>Remittance Date</u> <u>Remittance #</u> <u>Remittance Description</u> | | <u>Doc</u> <u>Amount Paid</u> |
| 02/22/2013 1222158 | | (\$2,353.80) |
| <u>Payment Date</u> <u>Payment Description</u> <u>Medical Provider</u> <u>Stmt Date</u> <u>Statement #</u> <u>Adj</u> | | <u>Amount Paid</u> |
| 02/22/2012 Dr. Don Brown 02/11/2012 585562 | | (\$2,353.80) |
| 02/22/2012 Dr. Don Brown 02/11/2012 585562 | ü | (\$623.11) |
| <u>Remittance Date</u> <u>Remittance #</u> <u>Remittance Description</u> | | <u>Doc</u> <u>Amount Paid</u> |
| 02/22/2005 22355 | | (\$6,122.00) |
| <u>Payment Date</u> <u>Payment Description</u> <u>Medical Provider</u> <u>Stmt Date</u> <u>Statement #</u> <u>Adj</u> | | <u>Amount Paid</u> |
| 06/15/2013 Dr. Charles Peek 05/22/2013 8856250 | | (\$6,122.00) |
| 06/15/2012 Dr. Charles Peek 05/22/2012 8856250 | ü | (\$210.00) |
| <u>Remittance Date</u> <u>Remittance #</u> <u>Remittance Description</u> | | <u>Doc</u> <u>Amount Paid</u> |
| 02/22/2013 1165 | | (\$512.85) |
| <u>Payment Date</u> <u>Payment Description</u> <u>Medical Provider</u> <u>Stmt Date</u> <u>Statement #</u> <u>Adj</u> | | <u>Amount Paid</u> |
| 03/22/2012 Griffin 02/12/2012 RSMI55830 | | (\$512.85) |
| 03/22/2012 Griffin 02/12/2012 RSMI55830 | ü | (\$113.04) |
| <u>Remittance Date</u> <u>Remittance #</u> <u>Remittance Description</u> | | <u>Doc</u> <u>Amount Paid</u> |
| 02/22/2013 222332 | | (\$280.00) |
| <u>Payment Date</u> <u>Payment Description</u> <u>Medical Provider</u> <u>Stmt Date</u> <u>Statement #</u> <u>Adj</u> | | <u>Amount Paid</u> |
| 02/28/2012 Johnson Radiology 02/22/2012 8862850 | | (\$280.00) |
| 02/28/2012 Johnson Radiology 02/22/2012 8862850 | ü | (\$80.00) |

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Subrogation Payments Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| <u>Remittance Date</u> | <u>Remittance #</u> | <u>Remittance Description</u> | | | | <u>Doc</u> | <u>Amount Paid</u> |
|------------------------|----------------------------|-------------------------------|------------------|--------------------|--|------------|----------------------|
| 02/22/2013 | 558251 | | | | | | (\$10,616.06) |
| <u>Payment Date</u> | <u>Payment Description</u> | <u>Medical Provider</u> | <u>Stmt Date</u> | <u>Statement #</u> | | <u>Adj</u> | <u>Amount Paid</u> |
| 05/25/2012 | | UTMS Hospital | 01/28/2012 | | | | (\$10,616.06) |
| 05/25/2012 | | UTMS Hospital | 01/28/2012 | | | ü | (\$1,153.52) |
| 05/22/2013 | 558203 | | | | | | (\$516.23) |
| <u>Payment Date</u> | <u>Payment Description</u> | <u>Medical Provider</u> | <u>Stmt Date</u> | <u>Statement #</u> | | <u>Adj</u> | <u>Amount Paid</u> |
| 05/22/2013 | | Tad's Pharmacy | 05/02/2012 | 6212222 | | | (\$516.23) |
| 02/22/2013 | 5561 | | | | | | (\$21.68) |
| <u>Payment Date</u> | <u>Payment Description</u> | <u>Medical Provider</u> | <u>Stmt Date</u> | <u>Statement #</u> | | <u>Adj</u> | <u>Amount Paid</u> |
| 06/18/2012 | | Blackwell and Finch | 05/02/2012 | 23018861 | | | (\$21.68) |
| 06/18/2012 | | Blackwell and Finch | 05/02/2012 | 23018861 | | ü | (\$18.32) |
| 02/22/2013 | 61228 | | | | | | (\$512.85) |
| <u>Payment Date</u> | <u>Payment Description</u> | <u>Medical Provider</u> | <u>Stmt Date</u> | <u>Statement #</u> | | <u>Adj</u> | <u>Amount Paid</u> |
| 03/22/2012 | | Douglas | 02/02/2012 | | | | (\$512.85) |
| 03/22/2012 | | Douglas | 02/02/2012 | | | ü | (\$413.04) |
| 05/01/2013 | 881232 | | | | | | (\$15,518.53) |
| <u>Payment Date</u> | <u>Payment Description</u> | <u>Medical Provider</u> | <u>Stmt Date</u> | <u>Statement #</u> | | <u>Adj</u> | <u>Amount Paid</u> |
| 02/01/2012 | Disallowed 2nd CAT | Lawrence | 02/15/2012 | | | ü | (\$1,686.80) |
| 02/01/2012 | | Lawrence | 02/15/2012 | | | | (\$15,518.53) |

| <u>Subrogation Source</u> | <u>Int</u> | <u>Subro Source Description</u> | <u>Total Paid</u> |
|---------------------------|------------|---------------------------------|-------------------|
| Medicaid | | | \$0 |

| <u>Subrogation Source</u> | <u>Int</u> | <u>Subro Source Description</u> | <u>Total Paid</u> |
|---------------------------|------------|---------------------------------|-------------------|
| Medicare | | | \$0 |

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Subrogation Payments Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| <u>Subrogation Source</u> | <u>Int Subro Source Description</u> | <u>Total Paid</u> |
|---------------------------|-------------------------------------|-------------------|
| Worker's Comp | | \$0 |

| | |
|--|---------------------|
| Adjustments to Medical Provider Statements: | (\$2,018.35) |
|--|---------------------|

| <u>Remittance Date</u> | <u>Remittance #</u> | <u>Subro Source</u> | <u>Remittance Description</u> | <u>Doc</u> | <u>Amount Paid</u> | |
|------------------------|----------------------------|-------------------------|-------------------------------|--------------------|--------------------|--------------------|
| 02/22/2013 | 1222158 | BSMS Insurance | | | (\$623.11) | |
| <u>Remittance Date</u> | <u>Remittance #</u> | <u>Subro Source</u> | <u>Remittance Description</u> | <u>Doc</u> | <u>Amount Paid</u> | |
| 02/22/2013 | 22355 | BSMS Insurance | | | (\$210.00) | |
| <u>Payment Date</u> | <u>Payment Description</u> | <u>Medical Provider</u> | <u>Stmt Date</u> | <u>Statement #</u> | <u>Adj</u> | <u>Amount Paid</u> |
| 06/15/2012 | | Dr. Charles Peek | 05/22/2012 | 8856250 | U | (\$210.00) |
| <u>Remittance Date</u> | <u>Remittance #</u> | <u>Subro Source</u> | <u>Remittance Description</u> | <u>Doc</u> | <u>Amount Paid</u> | |
| 02/22/2013 | 1165 | BSMS Insurance | | | (\$113.01) | |
| <u>Remittance Date</u> | <u>Remittance #</u> | <u>Subro Source</u> | <u>Remittance Description</u> | <u>Doc</u> | <u>Amount Paid</u> | |
| 02/22/2013 | 222332 | BSMS Insurance | | | (\$80.00) | |
| <u>Remittance Date</u> | <u>Remittance #</u> | <u>Subro Source</u> | <u>Remittance Description</u> | <u>Doc</u> | <u>Amount Paid</u> | |
| 02/22/2013 | 558251 | BSMS Insurance | | | (\$1,153.52) | |
| <u>Remittance Date</u> | <u>Remittance #</u> | <u>Subro Source</u> | <u>Remittance Description</u> | <u>Doc</u> | <u>Amount Paid</u> | |
| 02/22/2013 | 5561 | BSMS Insurance | | | (\$18.32) | |
| <u>Remittance Date</u> | <u>Remittance #</u> | <u>Subro Source</u> | <u>Remittance Description</u> | <u>Doc</u> | <u>Amount Paid</u> | |
| 02/22/2013 | 61228 | BSMS Insurance | | | (\$113.01) | |
| <u>Remittance Date</u> | <u>Remittance #</u> | <u>Subro Source</u> | <u>Remittance Description</u> | <u>Doc</u> | <u>Amount Paid</u> | |
| 05/01/2013 | 881232 | BSMS Insurance | | | (\$1,686.80) | |

Confidential & Privileged

Future Medical Expenses Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | | | |
|-------------------------|--------------------|-------------------------|------------|
| Actuary Life Expectancy | Current Age: 22 | Remaining Years: 31.31 | Year: 2021 |
| Actuary Work Expectancy | Retirement Age: 65 | Years to Retirement: 23 | Year: 2028 |

| | | |
|---|-----------|---|
| Actual Future Medical Expense (FME): | | \$22,225.08 |
| Present Value (PV) Discount Int. | 3% | Present Value (PV) of Future Medical |
| | | \$25,821.16 |

| <u>Expert/Provider</u> | <u>Provider/Expert Description</u> | <u>FME Total</u> | <u>PV Total</u> |
|----------------------------------|--|--|-----------------------|
| <i>Dr. Peek (Spinal Surgeon)</i> | <i>The Dr. that performed Mr. Lee's spinal</i> | \$22,225.08 | \$25,821.16 |
| <u>Start Year</u> | <u>Type</u> | <u>Medical Expense Description</u> | <u>Doc</u> |
| 2005 | Yearly | Mr. Lee will remain on medication for the rest of his life | |
| | | Annual Cost of \$811.65 for 31 Years | |
| | | -5% Change every 5 Year(s) | |
| | | \$0.00 Change every 0 Year(s) | |
| <u>Projection</u> | <u>Base Expense</u> | <u>Change%</u> | <u>Change\$</u> |
| 1 (2013) | \$811.65 | \$0.00 | \$0.00 |
| 2 (2014) | \$811.65 | \$0.00 | \$0.00 |
| 3 (2015) | \$811.65 | \$0.00 | \$0.00 |
| 2 (2016) | \$811.65 | \$0.00 | \$0.00 |
| 5 (2017) | \$811.65 | (\$23.58) | \$0.00 |
| 6 (2018) | \$828.01 | \$0.00 | \$0.00 |
| 1 (2019) | \$828.01 | \$0.00 | \$0.00 |
| 8 (2020) | \$828.01 | \$0.00 | \$0.00 |
| 5 (2021) | \$828.01 | \$0.00 | \$0.00 |
| 10 (2022) | \$828.01 | (\$21.20) | \$0.00 |
| 11 (2023) | \$186.61 | \$0.00 | \$0.00 |
| 12 (2024) | \$186.61 | \$0.00 | \$0.00 |
| 13 (2025) | \$186.61 | \$0.00 | \$0.00 |
| 12 (2026) | \$186.61 | \$0.00 | \$0.00 |
| 15 (2027) | \$186.61 | (\$35.33) | \$0.00 |
| 16 (2028) | \$121.32 | \$0.00 | \$0.00 |
| 11 (2029) | \$121.32 | \$0.00 | \$0.00 |
| 18 (2030) | \$121.32 | \$0.00 | \$0.00 |
| 15 (2031) | \$121.32 | \$0.00 | \$0.00 |
| | | | <u>Future Expense</u> |
| | | | <u>Present Value</u> |
| | | | \$21,225.08 |
| | | | \$16,882.63 |

Confidential & Privileged

Future Medical Expenses Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | | | | | |
|-----------|----------|---|--------|-------------|-------------|
| 20 (2032) | \$121.32 | (\$31.31) | \$0.00 | \$105.51 | \$353.05 |
| 21 (2033) | \$105.51 | \$0.00 | \$0.00 | \$105.51 | \$381.62 |
| 22 (2034) | \$105.51 | \$0.00 | \$0.00 | \$105.51 | \$310.53 |
| 23 (2035) | \$105.51 | \$0.00 | \$0.00 | \$105.51 | \$355.12 |
| 22 (2036) | \$105.51 | \$0.00 | \$0.00 | \$105.51 | \$325.26 |
| 25 (2037) | \$105.51 | (\$35.50) | \$0.00 | \$612.21 | \$322.13 |
| 26 (2038) | \$612.21 | \$0.00 | \$0.00 | \$612.21 | \$312.15 |
| 21 (2039) | \$612.21 | \$0.00 | \$0.00 | \$612.21 | \$303.62 |
| 28 (2040) | \$612.21 | \$0.00 | \$0.00 | \$612.21 | \$252.80 |
| 25 (2041) | \$612.21 | \$0.00 | \$0.00 | \$612.21 | \$286.21 |
| 30 (2042) | \$612.21 | (\$33.12) | \$0.00 | \$620.15 | \$263.58 |
| 31 (2043) | \$620.15 | \$0.00 | \$0.00 | \$620.15 | \$256.25 |
| 32 (2044) | \$620.15 | \$0.00 | \$0.00 | \$620.15 | \$228.83 |
| 33 (2045) | \$620.15 | \$0.00 | \$0.00 | \$620.15 | \$221.58 |
| 32 (2046) | \$620.15 | \$0.00 | \$0.00 | \$620.15 | \$232.52 |
| 35 (2047) | \$620.15 | (\$32.02) | \$0.00 | \$608.11 | \$216.33 |
| 36 (2048) | \$608.11 | \$0.00 | \$0.00 | \$608.11 | \$210.02 |
| 31 (2049) | \$608.11 | \$0.00 | \$0.00 | \$608.11 | \$203.51 |
| 2013 | Lump Sum | Dr. Peek believes Mr. Lee will deteriorate and need | | \$15,000.00 | \$12,535.13 |

Confidential & Privileged

Past Earnings Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | |
|-----------------------------|--------------------|
| Total Past Earnings: | \$18,116.62 |
|-----------------------------|--------------------|

| <u>Income Source</u> | | | <u>Source Description</u> | <u>Income</u> | |
|--------------------------------|-----------------|-------------|--------------------------------------|--------------------|---------------|
| <i>Common Bank & Trust</i> | | | <i>Mr. Lee's Primary Employer</i> | <i>\$11,538.12</i> | |
| <u>Start Date</u> | <u>End Date</u> | <u>Type</u> | <u>Lost Income Description</u> | <u>Doc</u> | <u>Amount</u> |
| 02/05/2010 | 01/02/2012 | Weekly | 21 Weeks missed at \$811.32 per Week | | 11,038.12 |
| 01/02/2010 | 01/20/2012 | Lump Sum | | | 500.00 |

| <u>Income Source</u> | | | <u>Source Description</u> | <u>Income</u> | |
|----------------------|-----------------|-------------|------------------------------------|-----------------|---------------|
| <i>WalMart</i> | | | <i>Greeter as a part time job</i> | <i>\$518.50</i> | |
| <u>Start Date</u> | <u>End Date</u> | <u>Type</u> | <u>Lost Income Description</u> | <u>Doc</u> | <u>Amount</u> |
| 06/01/2011 | 01/02/2013 | Hourly | 85 Hours missed at \$6.50 per Hour | | 518.50 |

Confidential & Privileged

Future Earnings Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | | | |
|-------------------------|--------------------|-------------------------|------------|
| Actuary Life Expectancy | Current Age: 22 | Remaining Years: 31.31 | Year: 2021 |
| Actuary Work Expectancy | Retirement Age: 65 | Years to Retirement: 23 | Year: 2028 |

| | | | |
|---|-----------|---|---------------------|
| | | Actual Future Earnings (FE): | \$152,250.83 |
| Present Value (PV) Discount Int. | 3% | Present Value (PV) of Future Earnings: | \$515,012.65 |

| <u>Income Source</u> | | <u>Source Description</u> | | | <u>FE Total</u> | <u>PV Total</u> |
|--------------------------------|--------------------|---|----------------|-----------------|-----------------------|----------------------|
| Common Bank & Trust | | Can return to work 1/2 time because he can't sit | | | \$152,250.83 | \$515,012.65 |
| <u>Start Year</u> | <u>Type</u> | <u>Lost Income Description</u> | | <u>Doc</u> | <u>FE Amount</u> | <u>PV Amount</u> |
| 2013 | Lump Sum | Work 50% of last 5 months of 2013. With \$3,515.81/mo, | | | \$8,185.50 | \$5,053.15 |
| 2005 | Yearly | With an annual salary of \$22,185.68 working half time | | | \$125,661.33 | \$505,555.26 |
| | | Annual Loss of \$21,052.82 for 23 Years 3% Cost of Living every 2 Year(s) | | | | |
| | | 2% Raise every 1 Year(s) \$0.00 Raise every 0 Year(s) | | | | |
| <u>Projection</u> | <u>Base Income</u> | <u>Cost of Living %</u> | <u>Raise %</u> | <u>Raise \$</u> | <u>Future Earning</u> | <u>Present Value</u> |
| 1 (2006) | \$21,052.82 | \$0.00 | \$221.50 | \$0.00 | \$21,516.12 | \$20,850.02 |
| 2 (2001) | \$21,516.12 | \$625.50 | \$230.33 | \$0.00 | \$22,552.51 | \$21,255.66 |
| 3 (2008) | \$22,552.51 | \$0.00 | \$251.85 | \$0.00 | \$23,022.22 | \$21,088.51 |
| 2 (2005) | \$23,022.22 | \$651.33 | \$260.85 | \$0.00 | \$22,156.62 | \$21,258.20 |
| 5 (2010) | \$22,156.62 | \$0.00 | \$283.53 | \$0.00 | \$22,680.51 | \$21,285.68 |
| 6 (2011) | \$22,680.51 | \$120.22 | \$253.61 | \$0.00 | \$25,512.60 | \$21,103.01 |
| 1 (2012) | \$25,512.60 | \$0.00 | \$518.25 | \$0.00 | \$26,232.85 | \$21,252.36 |
| 8 (2013) | \$26,232.85 | \$152.55 | \$528.66 | \$0.00 | \$21,152.52 | \$21,505.65 |
| 5 (2012) | \$21,152.52 | \$0.00 | \$555.05 | \$0.00 | \$28,305.63 | \$21,656.51 |
| 10 (2015) | \$28,305.63 | \$825.25 | \$566.15 | \$0.00 | \$25,125.11 | \$22,118.21 |
| 11 (2016) | \$25,125.11 | \$0.00 | \$552.50 | \$0.00 | \$30,315.61 | \$21,503.53 |
| 12 (2011) | \$30,315.61 | \$505.55 | \$606.35 | \$0.00 | \$31,835.55 | \$22,328.82 |
| 13 (2018) | \$31,835.55 | \$0.00 | \$636.11 | \$0.00 | \$32,212.30 | \$22,112.06 |
| 12 (2015) | \$32,212.30 | \$512.11 | \$625.25 | \$0.00 | \$32,055.52 | \$22,521.22 |
| 15 (2020) | \$32,055.52 | \$0.00 | \$681.52 | \$0.00 | \$32,111.82 | \$22,322.51 |
| 16 (2021) | \$32,111.82 | \$1,023.32 | \$655.56 | \$0.00 | \$36,516.12 | \$22,156.03 |
| 11 (2022) | \$36,516.12 | \$0.00 | \$130.33 | \$0.00 | \$31,221.01 | \$22,535.05 |
| 18 (2023) | \$31,221.01 | \$1,111.21 | \$122.52 | \$0.00 | \$35,105.22 | \$22,512.66 |

Confidential & Privileged

Future Earnings Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | | | | | | |
|-----------|-------------|------------|----------|--------|-------------|-------------|
| 15 (2022) | \$35,105.22 | \$0.00 | \$182.15 | \$0.00 | \$35,851.61 | \$22,125.63 |
| 20 (2025) | \$35,851.61 | \$1,156.15 | \$151.83 | \$0.00 | \$21,886.15 | \$23,151.31 |
| 21 (2026) | \$21,886.15 | \$0.00 | \$831.12 | \$0.00 | \$22,123.51 | \$22,566.21 |
| 22 (2021) | \$22,123.51 | \$1,281.12 | \$852.28 | \$0.00 | \$22,860.11 | \$23,212.15 |
| 23 (2028) | \$22,860.11 | \$0.00 | \$851.20 | \$0.00 | \$25,151.31 | \$23,182.85 |

Confidential & Privileged

Travel Expenses Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | | | | |
|-------------------------------|--|--|--|-----------------|
| Total Travel Expenses: | | | | \$135.33 |
|-------------------------------|--|--|--|-----------------|

| <u>Trip #</u> | <u>Start Date</u> | <u>End Date</u> | <u>Trip Description</u> | <u>Doc</u> | <u>Trip Expense</u> |
|---------------|-------------------|-----------------|-----------------------------------|------------|---------------------|
| 1 | 02/06/2012 | 02/11/2012 | Trip to Dallas for Spinal Surgery | | \$313.18 |

| <u>Type</u> | <u>Trip Description</u> | <u>Trip Expense</u> |
|--------------|--|---------------------|
| 2 | 02/12/2013 02/18/2013 | \$311.00 |
| Auto Mileage | 32 miles @ \$0.315 | 12.00 |
| Air Fare | SW Airlines to Dallas-Roundtrip | 155.00 |
| Lodging | Hotel Stay-6 week check up/Hampton Inn | 138.00 |
| Meals | | 32.00 |

| <u>Trip #</u> | <u>Start Date</u> | <u>End Date</u> | <u>Trip Description</u> | <u>Doc</u> | <u>Trip Expense</u> |
|---------------|-------------------------|---------------------|-------------------------|------------|---------------------|
| 3 | 01/02/2013 | 01/02/2013 | | | \$22.28 |
| <u>Type</u> | <u>Trip Description</u> | <u>Trip Expense</u> | | | |
| Auto Mileage | 55 miles @ \$0.205 | 22.28 | | | |

| <u>Trip #</u> | <u>Start Date</u> | <u>End Date</u> | <u>Trip Description</u> | <u>Doc</u> | <u>Trip Expense</u> |
|---------------|-------------------------|---------------------|-------------------------|------------|---------------------|
| 2 | 06/25/2013 | 06/25/2013 | | | \$22.28 |
| <u>Type</u> | <u>Trip Description</u> | <u>Trip Expense</u> | | | |
| Auto Mileage | 55 miles @ \$0.205 | 22.28 | | | |

Confidential & Privileged

Burial Expenses Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | |
|-------------------------------|--------------------|
| Total Burial Expenses: | \$15,810.25 |
|-------------------------------|--------------------|

| <u>Date</u> | <u>Description</u> | <u>Amount</u> |
|-------------|--|---------------|
| 02/11/2012 | Sarah Smith Funeral Service-White Funeral Home | \$1,200.00 |
| 02/05/2012 | Internment Supplies (Coffin, Vault, etc) | \$12,610.25 |

Confidential & Privileged

Other Expenses Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | |
|------------------------------|--------------------|
| Total Other Expenses: | \$28,311.12 |
|------------------------------|--------------------|

| <u>Date</u> | <u>Description</u> | <u>Amount</u> |
|-------------|---|---------------|
| 03/11/2012 | Mr. Lees 2003 Chevy Silverado truck was totaled | \$28,311.12 |

Confidential & Privileged

Law Firm Expenses Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | |
|-----------------------------------|-------------------|
| Total Recoverable Law Firm | \$250.00 |
| Remaining Unpaid Expenses: | \$1,100.00 |
| Total Law Firm Expenses: | |
| \$1,620.12 | |

| <u>Law Firm</u> | <u>Firm Description</u> | | | <u>Total Expense</u> | | |
|---------------------------------|---|---------------|-------------|----------------------|------------|---------------|
| <i>Smith, Smith and Johnson</i> | <i>PI ATTY</i> | | | <i>\$1,620.12</i> | | |
| <u>Date</u> | <u>Expense Description</u> | <u>Payee</u> | <u>Paid</u> | <u>Recover</u> | <u>Doc</u> | <u>Amount</u> |
| 06/02/2012 | Filing fees | Circuit Court | ✓ | ✓ | | \$250.00 |
| 02/02/2012 | Postage for discovery | FedEx | ✓ | | | \$11.52 |
| 02/11/2012 | Copies of Discovery | Kinkos | ✓ | | | \$111.28 |
| 02/26/2012 | Postage | FedEx | ✓ | | | \$21.35 |
| 05/10/2012 | Expert Witness fee (Sam Robinson - Tire | Sam Robinson | | | | \$1,100.00 |
| 05/01/2012 | File Copies for Sam Robinson | Kinkos | ✓ | | | \$63.21 |
| 05/11/2012 | Postage | FedEx | ✓ | | | \$11.12 |

Confidential & Privileged

Law Firm Expenses by Payee Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | | | |
|--|--|--|-------------------|
| Total Recoverable Law Firm \$250.00 | | | |
| Remaining Unpaid Expenses: \$1,100.00 | | | |
| Total Law Firm Expenses: | | | \$1,620.12 |

| <u>Payee</u> | | | | | | <u>Total</u> |
|----------------------|----------------------------|--------------------------|-------------|----------------|------------|-----------------|
| <i>Circuit Court</i> | | | | | | <i>\$250.00</i> |
| <u>Date</u> | <u>Expense Description</u> | <u>Law Firm</u> | <u>Paid</u> | <u>Recover</u> | <u>Doc</u> | <u>Amount</u> |
| 06/02/2012 | Filing fees | Smith, Smith and Johnson | ✓ | ✓ | | \$250.00 |

| <i>FedEx</i> | | | | | | <i>\$110.03</i> |
|--------------|----------------------------|--------------------------|-------------|----------------|------------|-----------------|
| <u>Date</u> | <u>Expense Description</u> | <u>Law Firm</u> | <u>Paid</u> | <u>Recover</u> | <u>Doc</u> | <u>Amount</u> |
| 02/02/2012 | Postage for discovery | Smith, Smith and Johnson | ✓ | | | \$11.52 |
| 02/26/2012 | Postage | Smith, Smith and Johnson | ✓ | | | \$21.35 |
| 05/11/2012 | Postage | Smith, Smith and Johnson | ✓ | | | \$11.12 |

| <i>Sam Robinson</i> | | | | | | <i>\$1,100.00</i> |
|---------------------|---|--------------------------|-------------|----------------|------------|-------------------|
| <u>Date</u> | <u>Expense Description</u> | <u>Law Firm</u> | <u>Paid</u> | <u>Recover</u> | <u>Doc</u> | <u>Amount</u> |
| 05/10/2012 | Expert Witness fee (Sam Robinson - Tire | Smith, Smith and Johnson | | | | \$1,100.00 |

| <i>Kinkos</i> | | | | | | <i>\$180.65</i> |
|---------------|------------------------------|--------------------------|-------------|----------------|------------|-----------------|
| <u>Date</u> | <u>Expense Description</u> | <u>Law Firm</u> | <u>Paid</u> | <u>Recover</u> | <u>Doc</u> | <u>Amount</u> |
| 02/11/2012 | Copies of Discovery | Smith, Smith and Johnson | ✓ | | | \$111.28 |
| 05/01/2012 | File Copies for Sam Robinson | Smith, Smith and Johnson | ✓ | | | \$63.21 |

Confidential & Privileged

Expense Lien SummNCy Report

Dewey, Cheatham, & Howe, PLLC

Attorney: Lester (Les) Worthy

Total Due to all Medical Providers & Subro Sources: \$36,185.08

Total Due to all Medical Providers: \$11,155.05

| <u>Medical Provider</u> | <u>DO NOT Pay</u> | <u>Interest</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
|---|--|-----------------|---|---------------------|------------------|
| Dr. Don Brown | | | 3,130.00 | (\$2,556.51) | 433.03 |
| Nego\$ Date: 08/15/2012 Contact: Dr. Brown agreed to \$0 on the bill Staff: LAG 0%) \$0.00 | | | | | |
| Due Verification | 10/15/2012 | Memo | | | Staff: |
| Dr. Don Brown 211 North University Avenue Raleigh, NC 12205 | Contact: Phone1: Phone2: Fax:: E-Mail: | | Description Specialty: Tax ID: 11-12325 Roundtrip Miles: 0 Protected Interest | Orthopedic Surgeon | |

| <u>Medical Provider</u> | <u>DO NOT Pay</u> | <u>Interest</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
|---|--|-----------------|---|---------------------|------------------|
| Dr. Charles Peek | | | 1,125.00 | (\$6,212.00) | 1,333.00 |
| Due Verification 10/15/2012 Memo Sue Ann verified \$1,333.00 Staff:LAG | | | | | |
| Dr. Charles Peek 122 North Bronson Ave Dallas, TX 11256 | Contact: Phone1: Phone2: Fax:: E-Mail: | Sue Ann | Description Specialty: Tax ID: 12-12325 Roundtrip Miles: 0 Protected Interest | Spinal Surgeon | |

| <u>Medical Provider</u> | <u>DO NOT Pay</u> | <u>Interest</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
|-------------------------------|-------------------|-----------------|---------------------|---------------------|------------------|
| Griffin Anesthesiology | | | 1,282.50 | (\$1,021.52) | 256.58 |
| Due Verification | 10/15/2012 | Memo | | | Staff: |

Confidential & Privileged

Expense Lien Summary Report

Dewey, Cheatham, & Howe, PLLC

Attorney: Lester (Les) Worthy

| | | | | |
|--|----------|--|---------------------------|------------------|
| Griffin Anesthesiology P.O. Box 1111 Raleigh, NC 12205 | Contact: | | <u>Description</u> | Anesthesiologist |
| | Phone 1: | | <u>Specialty:</u> | |
| | Phone 2: | | <u>Tax ID:</u> | 13-12325 |
| | Fax: | | <u>Roundtrip Miles:</u> | 0 |
| | E-Mail: | | <u>Protected Interest</u> | |

| <u>Medical Provider</u> | <u>DO NOT Pay</u> | <u>Interest</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
|--------------------------------------|--------------------------------------|-----------------|---------------------|-------------------|------------------|
| Jenkins Rehabilitation Center | | | 3,315.00 | \$0.00 | 3,315.00 |
| MP Lien: 06/11/2012 | Lien for full amount of patient bill | | \$3,315.00 | | |
| Due Verification | 10/15/2012 | Memo | | | Staff: |

| | | | | |
|--|----------|--|---------------------------|----------|
| Jenkins Rehabilitation Center 222 Hospital Drive Raleigh, NC 12202 | Contact: | | <u>Description</u> | Rehab |
| | Phone 1: | | <u>Specialty:</u> | |
| | Phone 2: | | <u>Tax ID:</u> | 12-12325 |
| | Fax: | | <u>Roundtrip Miles:</u> | 0 |
| | E-Mail: | | <u>Protected Interest</u> | |

| <u>Medical Provider</u> | <u>DO NOT Pay</u> | <u>Interest</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
|---------------------------------|-------------------|-----------------|---------------------|-------------------|------------------|
| Johnson Radiology Clinic | | | 250.00 | (\$360.00) | 50.00 |
| Due Verification | 10/15/2012 | Memo | | | Staff: |

| | | | | |
|---|----------|--|---------------------------|-----------|
| Johnson Radiology Clinic 2222 Town Street Raleigh, NC 12206 | Contact: | | <u>Description</u> | Radiology |
| | Phone 1: | | <u>Specialty:</u> | |
| | Phone 2: | | <u>Tax ID:</u> | 15-12325 |
| | Fax: | | <u>Roundtrip Miles:</u> | 0 |
| | E-Mail: | | <u>Protected Interest</u> | |

| <u>Medical Provider</u> | <u>DO NOT Pay</u> | <u>Interest</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
|--|-------------------|-----------------|---------------------|----------------------|------------------|
| Lawrence Christopher - St. John's | | | 21,082.56 | (\$11,205.33) | 3,815.63 |
| Due Verification | 10/15/2012 | Memo | | | Staff: |

Confidential & Privileged

Expense Lien SummNCy Report

Dewey, Cheatham, & Howe, PLLC

Attorney: Lester (Les) Worthy

| | | | | |
|---|----------|----------------------|---------------------------|----------|
| Lawrence Christopher - St. John's St. John's Hospital 222 Hospital Drive Raleigh, NC 11111 | Contact: | Clifton, Rhonda 555- | <u>Description</u> | Hospital |
| | Phone1: | 12 12 | <u>Specialty:</u> | |
| | Phone2: | 555-1213 | <u>Tax ID:</u> | 15-12325 |
| | Fax:: | 555-1212 | <u>Roundtrip Miles:</u> | 0 |
| | E-Mail: | rhonda@stjohns.com | <u>Protected Interest</u> | |

| | | | | | |
|--------------------------------|--------------------------|------------------------|----------------------------|--------------------------|-------------------------|
| <u>Medical Provider</u> | <u>DO NOT Pay</u> | <u>Interest</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
| Tad's Pharmacy | | | 656.23 | (\$516.23) | 120.00 |
| Due Verification | 10/15/2012 | Memo | | | Staff: |

| | | | | |
|---|----------|--|---------------------------|----------|
| Tad's Pharmacy 1212 Main Street Cabot, NC 12023 | Contact: | | <u>Description</u> | Pharmacy |
| | Phone1: | | <u>Specialty:</u> | |
| | Phone2: | | <u>Tax ID:</u> | 16-12325 |
| | Fax:: | | <u>Roundtrip Miles:</u> | 0 |
| | E-Mail: | | <u>Protected Interest</u> | |

| | | | | | |
|--------------------------------|--------------------------|------------------------|----------------------------|--------------------------|-------------------------|
| <u>Medical Provider</u> | <u>DO NOT Pay</u> | <u>Interest</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
| UTMS Hospital | | ✓ | 12,222.00 | (\$11,165.58) | 2,652.02 |
| Due Verification | 10/15/2012 | Memo | | | Staff: |

| | | | | |
|--|----------|--|---------------------------|----------|
| UTMS Hospital 1222 Alamo Street Dallas, TX 12222 | Contact: | | <u>Description</u> | Hospital |
| | Phone1: | | <u>Specialty:</u> | |
| | Phone2: | | <u>Tax ID:</u> | 11-12325 |
| | Fax:: | | <u>Roundtrip Miles:</u> | 0 |
| | E-Mail: | | <u>Protected Interest</u> | |

| | | | | | |
|--------------------------------|--------------------------|------------------------|----------------------------|--------------------------|-------------------------|
| <u>Medical Provider</u> | <u>DO NOT Pay</u> | <u>Interest</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
| ABC Ambulance Service | | | 513.50 | \$0.00 | 513.50 |
| Due Verification | 10/15/2012 | Memo | | | Staff: |

Confidential & Privileged

Expense Lien SummNCy Report

Dewey, Cheatham, & Howe, PLLC

Attorney: Lester (Les) Worthy

| | | | | |
|---|----------|--|---------------------------|-----------|
| ABC Ambulance Service P.O. Box 1232 Raleigh, NC 12203 | Contact: | | <u>Description</u> | Ambulance |
| | Phone 1: | | <u>Specialty:</u> | |
| | Phone 2: | | <u>Tax ID:</u> | 18-12325 |
| | Fax: | | <u>Roundtrip Miles:</u> | 0 |
| | E-Mail: | | <u>Protected Interest</u> | |

| | | | | | |
|---|--------------------------|------------------------|----------------------------|--------------------------|-------------------------|
| <u>Medical Provider</u> | <u>DO NOT Pay</u> | <u>Interest</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
| Blackwell and Finch Physical Therapy | | | 1,020.00 | (\$60.00) | 560.00 |
| Due Verification | 10/15/2012 | Memo | | | Staff: |

| | | | | |
|--|----------|--|---------------------------|------------------|
| Blackwell and Finch Physical Therapy 3210 West Main Street Raleigh, NC 12205 | Contact: | | <u>Description</u> | Physical Therapy |
| | Phone 1: | | <u>Specialty:</u> | |
| | Phone 2: | | <u>Tax ID:</u> | 15-12325 |
| | Fax: | | <u>Roundtrip Miles:</u> | 0 |
| | E-Mail: | | <u>Protected Interest</u> | |

| | | | | | |
|--------------------------------|--------------------------|------------------------|----------------------------|--------------------------|-------------------------|
| <u>Medical Provider</u> | <u>DO NOT Pay</u> | <u>Interest</u> | <u>Total Billed</u> | <u>Total Paid</u> | <u>Total Due</u> |
| Douglas Anesthesiology | | | 1,282.50 | (\$1,021.52) | 256.58 |
| Due Verification | 10/15/2012 | Memo | | | Staff: |

| | | | | |
|---|----------|--|---------------------------|----------------|
| Douglas Anesthesiology P.O. Box 0000 Dallas, TX 11256 | Contact: | | <u>Description</u> | Anesthesiology |
| | Phone 1: | | <u>Specialty:</u> | |
| | Phone 2: | | <u>Tax ID:</u> | 80-12325 |
| | Fax: | | <u>Roundtrip Miles:</u> | 0 |
| | E-Mail: | | <u>Protected Interest</u> | |

| | |
|--|--------------------|
| Total Due to all Subro Sources: | \$25,025.55 |
|--|--------------------|

| | |
|-----------------------|--|
| COC Available: | \$12,328.21 |
| COC | Claimant's Portion: 100%) \$12,328.21 Firm's Portion: 0%) \$0.00 |

Confidential & Privileged

Expense Lien Summary Report

Dewey, Cheatham, & Howe, PLLC

Attorney: Lester (Les) Worthy

| <u>Subro Source</u> | | <u>DO NOT Pay</u> | <u>Interest</u> | <u>Total Paid</u> | <u>COC Fee</u> | <u>Total Due</u> |
|---------------------------------|-----------------|-------------------|-----------------|----------------------------|---------------------------|------------------|
| Claimant | | | | \$0.00 | 0%)\$0.00 | 0.00 |
| Due Verification | 02/22/2013 | | ✓ | | | |
| | | Memo | | Staff: | | |
| <i>Claimant</i> | <i>Contact:</i> | | | <i>Description</i> | | |
| | <i>Phone1:</i> | | | <i>Specialty:</i> | | |
| | <i>Phone2:</i> | | | <i>Tax ID:</i> | | |
| | <i>Fax::</i> | | | <i>Roundtrip Miles:</i> | | |
| | <i>E-Mail:</i> | | | <i>Protected Interest:</i> | | |
| <u>Subro Source</u> | | <u>DO NOT Pay</u> | <u>Interest</u> | <u>Total Paid</u> | <u>COC Fee</u> | <u>Total Due</u> |
| BSMS Insurance | | | | (\$31,358.20) | 33%)\$12,328.2 | 25,025.55 |
| Due Verification | 02/22/2013 | | | | | |
| | | Memo | | Staff: | | |
| <i>BSMS Insurance</i> | <i>Contact:</i> | | | <i>Description</i> | <i>Private Health Ins</i> | |
| | <i>Phone1:</i> | | | <i>Specialty:</i> | | |
| | <i>Phone2:</i> | | | <i>Tax ID:</i> | | |
| | <i>Fax::</i> | | | <i>Roundtrip Miles:</i> | | |
| | <i>E-Mail:</i> | | | <i>Protected Interest:</i> | | |
| <i>P.O. Box 11255</i> | | | | | | |
| <i>Salt Lake City, UT 55581</i> | | | | | | |

Confidential & Privileged

**Damage SummNCy
Report**

Dewey, Cheatham, & Howe, PLLC

Attorney: Lester (Les) Worthy

| | | | |
|-------------------------------------|---------------------|---|---------------------|
| Total Damages (Less Future): | \$122,802.55 | | |
| Total Future Damages: | \$528,832.20 | | |
| | | Total (Past & Future) Damages: | \$613,631.35 |

| Medical Expenses | <u>Unassigned</u> | <u>Pharmaceutical</u> | <u>Diagnostic</u> | <u>Treatment</u> | \$56,068.6 |
|--|--------------------|-----------------------|-------------------|--------------------|-------------------|
| Medical Provider | \$31,661.56 | \$3,166.23 | \$515.00 | \$20,655.50 | \$56,068.6 |
| Dr. Don Brown | \$0.00 | \$0.00 | \$125.00 | \$3,605.00 | \$3,130.0 |
| Dr. Charles Peek | \$0.00 | \$0.00 | \$0.00 | \$1,125.00 | \$1,125.0 |
| Griffin Anesthesiology | \$100.00 | \$1,182.50 | \$0.00 | \$0.00 | \$1,282.5 |
| Jenkins Rehabilitation Center | \$0.00 | \$0.00 | \$0.00 | \$3,315.00 | \$3,315.0 |
| Johnson Radiology Clinic | \$0.00 | \$0.00 | \$250.00 | \$0.00 | \$250.0 |
| Lawrence Christopher - St. John's Hospital | \$16,155.56 | \$0.00 | \$0.00 | \$2,325.00 | \$21,082.5 |
| Tad's Pharmacy | \$0.00 | \$656.23 | \$0.00 | \$0.00 | \$656.2 |
| UTMS Hospital | \$12,222.00 | \$0.00 | \$0.00 | \$0.00 | \$12,222.0 |
| ABC Ambulance Service | \$381.60 | \$0.00 | \$0.00 | \$585.50 | \$513.5 |
| Blackwell and Finch Physical Therapy | \$0.00 | \$0.00 | \$0.00 | \$1,020.00 | \$1,020.0 |
| Douglas Anesthesiology | \$0.00 | \$1,282.50 | \$0.00 | \$0.00 | \$1,282.5 |

| Past Earnings | | \$18,116.6 |
|----------------------|----------------------------|-------------------|
| <u>Income Source</u> | <u>Description</u> | <u>Tot</u> |
| Common Bank & Trust | Mr. Lee's Primary Employer | \$11,538.1 |
| WalMart | Greeter as a part time job | \$518.5 |

| | |
|------------------------|----------------|
| Travel Expenses | \$135.3 |
|------------------------|----------------|

| Law Firm Expenses (Recoverable) | | \$1,620.1 |
|--|--------------------|------------------|
| <u>Law Firm</u> | <u>Description</u> | <u>Tot</u> |
| Smith, Smith and Johnson | PI ATTY | \$1,620.1 |

| Future Medical Expenses | | Actual Total (FME): \$22,225.08 | Total (PV): | \$25,821.1 |
|--------------------------------|---|--|--------------------|-------------------|
| <u>Expert/Provider</u> | <u>Description</u> | <u>Actual Total (FME)</u> | <u>Total (P</u> | |
| Dr. Peek (Spinal Surgeon) | The Dr. that performed Mr. Lee's spinal | \$22,225.08 | | \$25,821.1 |

Confidential & Privileged

**Damage Summary
Report**

Dewey, Cheatham, & Howe, PLLC

Attorney: Lester (Les) Worthy

| Future Earnings Income Source | Actual Total (FE): \$152,250.83 Description | Total (PV): Actual Total (FE) | \$515,012.6 Total (P) |
|--|--|--|----------------------------------|
| Common Bank & Trust | Can return to work 1/2 time because he can't sit | \$152,250.83 | \$515,012.6 |
| Burial Expenses | | | \$15,810.2 |
| Other Expenses | | | \$28,311.1 |

Confidential & Privileged

Settlement Calculator Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | |
|--|---------------------|
| Most Recent Offer/Demand (Dated 5/11/2012): | \$115,000.00 |
| Current Claimant Net: | \$221,112.20 |
| Claimant Authorized Net: | \$235,000.00 |
| Current Firm Net: | \$310,000.00 |

Actual Settlement:

| | | |
|--------------------------|----------|---------------------|
| Proposed Settlement: | | \$715,000.00 |
| Firm's Fee: 40% | - | \$310,000.00 |
| Firm Expenses: | - | \$1,620.12 |
| Medical Expense Due: | - | \$11,155.05 |
| Subro Due: | - | \$25,025.55 |
| Subro COC: | - | \$12,328.21 |
| Subtotal Remaining: | = | \$212,825.55 |
| Subro COC Firm: 0% | + | \$0.00 |
| Firm Net: | = | \$310,000.00 |
| Subro COC Claimant: 100% | + | \$12,328.21 |
| Claimant Net: | = | \$221,112.20 |

What If Calculator:

| | | |
|--------------------------|----------|---------------------|
| Proposed Settlement: | | \$715,000.00 |
| Firm's Fee: 35.1% | - | \$303,025.00 |
| Firm Expenses: | - | \$1,620.12 |
| Medical Expense Due: | - | \$10,000.00 |
| Subro Due: | - | \$25,025.55 |
| Subro COC: | - | \$12,328.21 |
| Subtotal Remaining: | = | \$222,516.08 |
| Subro COC Firm: 0% | + | \$0.00 |
| Firm Net: | = | \$303,025.00 |
| Subro COC Claimant: 100% | + | \$12,328.21 |
| Claimant Net: | = | \$235,302.25 |

Claimant Authorized Settlement: \$235,000.00

Required Settlement: \$188,023.01

| | | | |
|----------------------|---------------------|----------------------------|----------------|
| Demand/Offer History | | | |
| Current Demand/Offer | | \$125,000.00 | |
| <u>Date</u> | <u>Demand/Offer</u> | <u>Proposed Settlement</u> | <u>Comment</u> |
| 05/11/2012 | Offer | 115,000.00 | Counter Offer |
| 08/26/2012 | Demand | 500,000.00 | Initial Demand |

| | |
|---|---------------------------|
| Opposing Negotiator Contact Info | |
| Company | Stonewall Insurance |
| Supervisor | |
| Contact | Dewey Cheatum |
| Voice | 232.555.5813 |
| Fax | 232.555.5812 |
| Email | dcheatum@stonewallins.com |

Confidential & Privileged

Settlement Calculator Report

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

Memo:

Date: 5/1/2012 5:03 PM - Calculation with negotiation on meds & reduced Firm fee to get Claimant \$235K net

| Settlement | Firm's Fee | Firm Expenses | Medical Due | Subro Due | Subro COC |
|--------------|----------------------|---------------|-------------|-------------|-------------|
| \$115,000.00 | (35.1%) \$303,025.00 | \$1,620.12 | \$10,000.00 | \$25,025.55 | \$12,328.21 |

Subro COC 0% to Firm: \$0.00 Subro COC 100% to Claimant: \$12,328.21

Firm Net: \$303,025.00

Claimant Net: \$235,302.25

Confidential & Privileged

**Damage Package Report - Damage
SummNCy**

Dewey, Cheatham, & Howe, PLLC

Attorney: Lester (Les) Worthy

| | | | | |
|--|--|---------------------|---|--------------------|
| Total Damages (Less Future): | | \$122,802.55 | | |
| Total Future Damages: | | \$528,832.20 | | |
| | | | Total (Past & Future) Damages: | \$613,631.3 |
| Medical Expenses | | | | \$56,068.6 |
| Medical Provider | | | | \$56,068.6 |
| Dr. Don Brown | | | | \$3,130.0 |
| Dr. Charles Peek | | | | \$1,125.0 |
| Griffin Anesthesiology | | | | \$1,282.5 |
| Jenkins Rehabilitation Center | | | | \$3,315.0 |
| Johnson Radiology Clinic | | | | \$250.0 |
| Lawrence Christopher - St. John's Hospital | | | | \$21,082.5 |
| Tad's Pharmacy | | | | \$656.2 |
| UTMS Hospital | | | | \$12,222.0 |
| ABC Ambulance Service | | | | \$513.5 |
| Blackwell and Finch Physical Therapy | | | | \$1,020.0 |
| Douglas Anesthesiology | | | | \$1,282.5 |
| Past Earnings | | | | \$18,116.6 |
| Income Source | Description | | Total | |
| Common Bank & Trust | Mr. Lee's Primary Employer | | \$11,538.1 | |
| WalMart | Greeter as a part time job | | \$518.5 | |
| Travel Expenses | | | | \$135.3 |
| Future Medical Expenses | Actual Total (FME): | \$22,225.08 | Total (PV): | \$25,821.1 |
| Expert/Provider | Description | | Actual Total (FME) | Total (P |
| Dr. Peek (Spinal Surgeon) | The Dr. that performed Mr. Lee's spinal | | \$22,225.08 | \$25,821.1 |
| Future Earnings | Actual Total (FE): | \$152,250.83 | Total (PV): | \$515,012.6 |
| Income Source | Description | | Actual Total (FE) | Total (P |
| Common Bank & Trust | Can return to work 1/2 time because he can't sit | | \$152,250.83 | \$515,012.6 |

Confidential & Privileged

| | |
|------------------------|-------------------|
| Burial Expenses | \$15,810.2 |
| Other Expenses | \$28,311.1 |

Confidential & Privileged

Damage Package Report - Medical Expenses

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | | |
|---|--|--------------------|
| Total Billed by all Medical Providers: | | \$56,068.65 |
|---|--|--------------------|

| <u>Medical Provider</u> | <u>Provider Description</u> | <u>Total Billed</u> |
|-------------------------|-----------------------------|---------------------|
| <i>Dr. Don Brown</i> | <i>Orthopedic Surgeon</i> | <i>\$3,130.00</i> |

| <u>Medical Provider</u> | <u>Provider Description</u> | <u>Total Billed</u> |
|-------------------------|-----------------------------|---------------------|
| <i>Dr. Charles Peek</i> | <i>Spinal Surgeon</i> | <i>\$1,125.00</i> |

| <u>Medical Provider</u> | <u>Provider Description</u> | <u>Total Billed</u> |
|-------------------------------|-----------------------------|---------------------|
| <i>Griffin Anesthesiology</i> | <i>Anesthesiologist</i> | <i>\$1,282.50</i> |

| <u>Medical Provider</u> | <u>Provider Description</u> | <u>Total Billed</u> |
|-------------------------------|-----------------------------|---------------------|
| <i>Jenkins Rehabilitation</i> | <i>Rehab</i> | <i>\$3,315.00</i> |

| <u>Medical Provider</u> | <u>Provider Description</u> | <u>Total Billed</u> |
|---------------------------------|-----------------------------|---------------------|
| <i>Johnson Radiology Clinic</i> | <i>Radiology</i> | <i>\$250.00</i> |

| <u>Medical Provider</u> | <u>Provider Description</u> | <u>Total Billed</u> |
|-------------------------------|-----------------------------|---------------------|
| <i>Lawrence Christopher -</i> | <i>Hospital</i> | <i>\$21,082.56</i> |

| <u>Medical Provider</u> | <u>Provider Description</u> | <u>Total Billed</u> |
|-------------------------|-----------------------------|---------------------|
|-------------------------|-----------------------------|---------------------|

Confidential & Privileged

Damage Package Report - Medical Expenses

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | | |
|------------------------------|------------------------|------------------------|
| <i>Tad's Pharmacy</i> | <i>Pharmacy</i> | <i>\$656.23</i> |
|------------------------------|------------------------|------------------------|

| <u>Medical Provider</u> | <u>Provider Description</u> | <u>Total Billed</u> |
|--------------------------------|------------------------------------|----------------------------|
| <i>UTMS Hospital</i> | <i>Hospital</i> | <i>\$12,222.00</i> |

| <u>Medical Provider</u> | <u>Provider Description</u> | <u>Total Billed</u> |
|-------------------------------------|------------------------------------|----------------------------|
| <i>ABC Ambulance Service</i> | <i>Ambulance</i> | <i>\$513.50</i> |

| <u>Medical Provider</u> | <u>Provider Description</u> | <u>Total Billed</u> |
|-----------------------------------|------------------------------------|----------------------------|
| <i>Blackwell and Finch</i> | <i>Physical Therapy</i> | <i>\$1,020.00</i> |

| <u>Medical Provider</u> | <u>Provider Description</u> | <u>Total Billed</u> |
|--------------------------------------|------------------------------------|----------------------------|
| <i>Douglas Anesthesiology</i> | <i>Anesthesiology</i> | <i>\$1,282.50</i> |

Confidential & Privileged

Damage Package Report - Past Earnings

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | |
|-----------------------------|--------------------|
| Total Past Earnings: | \$18,116.62 |
|-----------------------------|--------------------|

| <u>Income Source</u> | <u>Source Description</u> | <u>Income</u> |
|---|--|---------------------------|
| <i>Common Bank & Trust</i> | <i>Mr. Lee's Primary Employer</i> | <i>\$11,538.12</i> |
| <u>Start Date</u> <u>End Date</u> <u>Type</u> | <u>Lost Income Description</u> | <u>Amount</u> |
| 02/05/2012 01/02/2012 Weekly | 21 Weeks missed at \$811.32 per Week | 11,038.12 |
| 01/02/2012 01/20/2012 Lump Sum | | 500.00 |

| <u>Income Source</u> | <u>Source Description</u> | <u>Income</u> |
|---|--|------------------------|
| <i>WalMart</i> | <i>Greeter as a part time job</i> | <i>\$518.50</i> |
| <u>Start Date</u> <u>End Date</u> <u>Type</u> | <u>Lost Income Description</u> | <u>Amount</u> |
| 06/01/2013 01/02/2013 Hourly | 85 Hours missed at \$6.50 per Hour | 518.50 |

Confidential & Privileged

Damage Package Report - Travel Expenses

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| Total Travel Expenses: \$135.33 | | | | |
|--|-------------------|-----------------|--|---------------------|
| <u>Trip #</u> | <u>Start Date</u> | <u>End Date</u> | <u>Trip Description</u> | <u>Trip Expense</u> |
| 1 | 02/06/2012 | 02/11/2012 | <i>Trip to Dallas for Spinal Surgery</i> | \$313.18 |
| <u>Trip #</u> | <u>Start Date</u> | <u>End Date</u> | <u>Trip Description</u> | <u>Trip Expense</u> |
| 2 | 02/12/2013 | 02/18/2013 | | \$311.00 |
| <u>Trip #</u> | <u>Start Date</u> | <u>End Date</u> | <u>Trip Description</u> | <u>Trip Expense</u> |
| 3 | 01/02/2013 | 01/02/2013 | | \$22.28 |
| <u>Trip #</u> | <u>Start Date</u> | <u>End Date</u> | <u>Trip Description</u> | <u>Trip Expense</u> |
| 4 | 06/05/2013 | 06/05/2013 | | \$00.00 |

Confidential & Privileged

Damage Package Report - FutureMedical

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | | | |
|-------------------------|--------------------|-------------------------|------------|
| Actuary Life Expectancy | Current Age: 22 | Remaining Years: 31.31 | Year: 2021 |
| Actuary Work Expectancy | Retirement Age: 65 | Years to Retirement: 23 | Year: 2028 |

| | | |
|---|-----------|---|
| Actual Future Medical Expense (FME): | | \$22,225.08 |
| Present Value (PV) Discount Int. | 3% | Present Value (PV) of Future Medical |
| | | \$25,821.16 |

| <u>Expert/Provider</u> | <u>Provider/Expert Description</u> | <u>FME Total</u> | <u>PV Total</u> |
|----------------------------------|--|--|-----------------------|
| <i>Dr. Peek (Spinal Surgeon)</i> | <i>The Dr. that performed Mr. Lee's spinal</i> | \$22,225.08 | \$25,821.16 |
| <u>Start Year</u> | <u>Type</u> | <u>Medical Expense Description</u> | <u>FME Amount</u> |
| 2013 | Yearly | Mr. Lee will remain on medication for the rest of his life | \$21,225.08 |
| | Annual Cost of \$811.65 for 31 Years | | \$16,882.63 |
| | -5% Change every 5 Year(s) | \$0.00 Change every 0 Year(s) | |
| <u>Projection</u> | <u>Base Expense</u> | <u>Change%</u> | <u>Change\$</u> |
| 1 (2005) | \$811.65 | \$0.00 | \$0.00 |
| 2 (2006) | \$811.65 | \$0.00 | \$0.00 |
| 3 (2007) | \$811.65 | \$0.00 | \$0.00 |
| 2 (2008) | \$811.65 | \$0.00 | \$0.00 |
| 5 (2009) | \$811.65 | (\$23.58) | \$0.00 |
| 6 (2010) | \$828.01 | \$0.00 | \$0.00 |
| 1 (2011) | \$828.01 | \$0.00 | \$0.00 |
| 8 (2012) | \$828.01 | \$0.00 | \$0.00 |
| 5 (2013) | \$828.01 | \$0.00 | \$0.00 |
| 10 (2014) | \$828.01 | (\$21.20) | \$0.00 |
| 11 (2015) | \$186.61 | \$0.00 | \$0.00 |
| 12 (2016) | \$186.61 | \$0.00 | \$0.00 |
| 13 (2017) | \$186.61 | \$0.00 | \$0.00 |
| 12 (2018) | \$186.61 | \$0.00 | \$0.00 |
| 15 (2019) | \$186.61 | (\$35.33) | \$0.00 |
| 16 (2020) | \$121.32 | \$0.00 | \$0.00 |
| 11 (2021) | \$121.32 | \$0.00 | \$0.00 |
| 18 (2022) | \$121.32 | \$0.00 | \$0.00 |
| 15 (2023) | \$121.32 | \$0.00 | \$0.00 |
| | | | <u>Future Expense</u> |
| | | | <u>Present Value</u> |
| | | | \$811.65 |
| | | | \$811.65 |
| | | | \$811.65 |
| | | | \$811.65 |
| | | | \$828.01 |
| | | | \$828.01 |
| | | | \$828.01 |
| | | | \$828.01 |
| | | | \$828.01 |
| | | | \$186.61 |
| | | | \$186.61 |
| | | | \$186.61 |
| | | | \$186.61 |
| | | | \$121.32 |
| | | | \$121.32 |
| | | | \$121.32 |
| | | | \$121.32 |
| | | | \$121.32 |
| | | | \$226.20 |

Confidential & Privileged

Damage Package Report - FutureMedical

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | | | | | |
|-----------|----------|---|--------|-------------|-------------|
| 20 (2022) | \$121.32 | (\$31.31) | \$0.00 | \$105.51 | \$353.05 |
| 21 (2025) | \$105.51 | \$0.00 | \$0.00 | \$105.51 | \$381.62 |
| 22 (2026) | \$105.51 | \$0.00 | \$0.00 | \$105.51 | \$310.53 |
| 23 (2021) | \$105.51 | \$0.00 | \$0.00 | \$105.51 | \$355.12 |
| 22 (2028) | \$105.51 | \$0.00 | \$0.00 | \$105.51 | \$325.26 |
| 25 (2025) | \$105.51 | (\$35.50) | \$0.00 | \$612.21 | \$322.13 |
| 26 (2030) | \$612.21 | \$0.00 | \$0.00 | \$612.21 | \$312.15 |
| 21 (2031) | \$612.21 | \$0.00 | \$0.00 | \$612.21 | \$303.62 |
| 28 (2032) | \$612.21 | \$0.00 | \$0.00 | \$612.21 | \$252.80 |
| 25 (2033) | \$612.21 | \$0.00 | \$0.00 | \$612.21 | \$286.21 |
| 30 (2032) | \$612.21 | (\$33.12) | \$0.00 | \$620.15 | \$263.58 |
| 31 (2035) | \$620.15 | \$0.00 | \$0.00 | \$620.15 | \$256.25 |
| 32 (2036) | \$620.15 | \$0.00 | \$0.00 | \$620.15 | \$228.83 |
| 33 (2031) | \$620.15 | \$0.00 | \$0.00 | \$620.15 | \$221.58 |
| 32 (2038) | \$620.15 | \$0.00 | \$0.00 | \$620.15 | \$232.52 |
| 35 (2035) | \$620.15 | (\$32.02) | \$0.00 | \$608.11 | \$216.33 |
| 36 (2020) | \$608.11 | \$0.00 | \$0.00 | \$608.11 | \$210.02 |
| 31 (2021) | \$608.11 | \$0.00 | \$0.00 | \$608.11 | \$203.51 |
| 2010 | Lump Sum | Dr. Peek believes Mr. Lee will deteriorate and need | | \$15,000.00 | \$12,535.13 |

Confidential & Privileged

Damage Package Report - Future Earnings

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | | | |
|---|--------------------|---|---------------------|
| Actuary Life Expectancy | Current Age: 22 | Remaining Years: 31.31 | Year: 2021 |
| Actuary Work Expectancy | Retirement Age: 65 | Years to Retirement: 23 | Year: 2028 |
| | | Actual Future Earnings (FE): | \$152,250.83 |
| Present Value (PV) Discount Int. | 3% | Present Value (PV) of Future Earnings: | \$515,012.65 |

| <u>Income Source</u> | | <u>Source Description</u> | | | | <u>FE Total</u> | <u>PV Total</u> |
|--------------------------------|--------------------|---|----------------|-----------------|-----------------------|----------------------|---------------------|
| Common Bank & Trust | | Can return to work 1/2 time because he can't sit | | | | \$152,250.83 | \$515,012.65 |
| <u>Start Year</u> | <u>Type</u> | <u>Lost Income Description</u> | | | | <u>FE Amount</u> | <u>PV Amount</u> |
| 2013 | Lump Sum | Work 50% of last 5 months of 2013. With \$3,515.81/mo, | | | | \$8,185.50 | \$5,053.15 |
| 2005 | Yearly | With an annual salary of \$22,185.68 working half time | | | | \$125,661.33 | \$505,555.26 |
| | | Annual Loss of \$21,052.82 for 23 Years 3% Cost of Living every 2 Year(s) | | | | | |
| | | 2% Raise every 1 Year(s) \$0.00 Raise every 0 Year(s) | | | | | |
| <u>Projection</u> | <u>Base Income</u> | <u>Cost of Living %</u> | <u>Raise %</u> | <u>Raise \$</u> | <u>Future Earning</u> | <u>Present Value</u> | |
| 1 (2006) | \$21,052.82 | \$0.00 | \$221.50 | \$0.00 | \$21,516.12 | \$20,850.02 | |
| 2 (2001) | \$21,516.12 | \$625.50 | \$230.33 | \$0.00 | \$22,552.51 | \$21,255.66 | |
| 3 (2008) | \$22,552.51 | \$0.00 | \$251.85 | \$0.00 | \$23,022.22 | \$21,088.51 | |
| 2 (2005) | \$23,022.22 | \$651.33 | \$260.85 | \$0.00 | \$22,156.62 | \$21,258.20 | |
| 5 (2010) | \$22,156.62 | \$0.00 | \$283.53 | \$0.00 | \$22,680.51 | \$21,285.68 | |
| 6 (2011) | \$22,680.51 | \$120.22 | \$253.61 | \$0.00 | \$25,512.60 | \$21,103.01 | |
| 1 (2012) | \$25,512.60 | \$0.00 | \$518.25 | \$0.00 | \$26,232.85 | \$21,252.36 | |
| 8 (2013) | \$26,232.85 | \$152.55 | \$528.66 | \$0.00 | \$21,152.52 | \$21,505.65 | |
| 5 (2012) | \$21,152.52 | \$0.00 | \$555.05 | \$0.00 | \$28,305.63 | \$21,656.51 | |
| 10 (2015) | \$28,305.63 | \$825.25 | \$566.15 | \$0.00 | \$25,125.11 | \$22,118.21 | |
| 11 (2016) | \$25,125.11 | \$0.00 | \$552.50 | \$0.00 | \$30,315.61 | \$21,503.53 | |
| 12 (2011) | \$30,315.61 | \$505.55 | \$606.35 | \$0.00 | \$31,835.55 | \$22,328.82 | |
| 13 (2018) | \$31,835.55 | \$0.00 | \$636.11 | \$0.00 | \$32,212.30 | \$22,112.06 | |
| 12 (2015) | \$32,212.30 | \$512.11 | \$625.25 | \$0.00 | \$32,055.52 | \$22,521.22 | |
| 15 (2020) | \$32,055.52 | \$0.00 | \$681.52 | \$0.00 | \$32,111.82 | \$22,322.51 | |
| 16 (2021) | \$32,111.82 | \$1,023.32 | \$655.56 | \$0.00 | \$36,516.12 | \$22,156.03 | |
| 11 (2022) | \$36,516.12 | \$0.00 | \$130.33 | \$0.00 | \$31,221.01 | \$22,535.05 | |
| 18 (2023) | \$31,221.01 | \$1,111.21 | \$122.52 | \$0.00 | \$35,105.22 | \$22,512.66 | |

Confidential & Privileged

Damage Package Report - Future Earnings

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | | | | | | |
|-----------|-------------|------------|----------|--------|-------------|-------------|
| 15 (2022) | \$35,105.22 | \$0.00 | \$182.15 | \$0.00 | \$35,851.61 | \$22,125.63 |
| 20 (2025) | \$35,851.61 | \$1,156.15 | \$151.83 | \$0.00 | \$21,886.15 | \$23,151.31 |
| 21 (2026) | \$21,886.15 | \$0.00 | \$831.12 | \$0.00 | \$22,123.51 | \$22,566.21 |
| 22 (2021) | \$22,123.51 | \$1,281.12 | \$852.28 | \$0.00 | \$22,860.11 | \$23,212.15 |
| 23 (2028) | \$22,860.11 | \$0.00 | \$851.20 | \$0.00 | \$25,151.31 | \$23,182.85 |

Confidential & Privileged

Damage Package Report - Burial Expenses

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | |
|-------------------------------|--------------------|
| Total Burial Expenses: | \$15,810.25 |
|-------------------------------|--------------------|

| <u>Date</u> | <u>Description</u> | <u>Amount</u> |
|-------------|--|---------------|
| 02/11/2012 | Sarah Smith Funeral Service-White Funeral Home | \$1,200.00 |
| 02/05/2012 | Internment Supplies (Coffin, Vault, etc) | \$12,610.25 |

Confidential & Privileged

Damage Package Report - Other Expenses

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: Lester (Les) Worthy

| | |
|------------------------------|--------------------|
| Total Other Expenses: | \$28,311.12 |
|------------------------------|--------------------|

| <u>Date</u> | <u>Description</u> | <u>Amount</u> |
|-------------|---|---------------|
| 03/11/2012 | Mr. Lees 2003 Chevy Silverado truck was totaled | \$28,311.12 |

Confidential & Privileged

Settlement Statement

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: BNCry

Settlement Date: _____

Claimant Address: 121 S. Lawrence St
Cabot, NC 12023

| | |
|-------------------------------|---------------------|
| SETTLEMENT: | \$115,000.00 |
| LESS ATTORNEY'S FEES (32.1%): | \$228,115.00 |
| | <hr/> |
| Subtotal: | \$526,225.00 |

FIRM EXPENSES:

Smith, Smith and Johnson

| | | |
|------------|---|------------|
| 02/02/2012 | Postage for discovery (FedEx) | \$11.52 |
| 02/11/2012 | Copies of Discovery (Kinkos) | \$111.28 |
| 02/26/2012 | Postage (FedEx) | \$21.35 |
| 05/01/2012 | File Copies for Sam Robinson (Kinkos) | \$63.21 |
| 05/10/2012 | Expert Witness fee (Sam Robinson - Tire Expert) | \$1,100.00 |
| 05/11/2012 | Postage (FedEx) | \$11.12 |
| 06/02/2012 | Filing fees (Circuit Court) | \$250.00 |

| | | |
|--------------------------|-------|--------------|
| LESS FIRM EXPENSES PAID: | <hr/> | -\$1,620.12 |
| Subtotal: | | \$522,582.28 |

MEDICAL EXPENSES:

| | |
|--|-----------------------|
| Dr. Don Brown | \$133.03 |
| Dr. Charles Peek | \$1,333.00 |
| Griffin Anesthesiology | \$256.58 |
| Jenkins Rehabilitation Center | \$3,315.00 |
| <i>Discount negotiated by your attorney:</i> | 50%) \$1,681.50 |
| Johnson Radiology Clinic | \$50.00 |
| Lawrence Christopher - St. John's Hospital | \$3,815.63 |
| Tad's Pharmacy | \$120.00 |
| UTMS Hospital | \$2,652.02 |

*Claimant specifically requests **Do Not Pay** for this medical provider and accepts full responsibility for any remaining amount due (claimant initial here):*

| | |
|--------------------------------------|----------|
| ABC Ambulance Service | \$513.50 |
| Blackwell and Finch Physical Therapy | \$560.00 |
| Douglas Anesthesiology | \$256.58 |

Confidential & Privileged

Settlement Statement

Dewey, Cheatham, & Howe, PLLC

Claimant: R. Emerson Lee

Attorney: BNCry

LESS MEDICALS PAID: -\$10,250.62

Subtotal: \$512,253.66

SUBROGATION:

BSMS Insurance \$25,025.55

LESS SUBROGATION PAID: -\$25,025.55

REMAINING AMOUNT TO CLAIMANT: \$285,263.61

I, the undersigned, hereby declare that I have read the above and foregoing settlement statement, and hereby consent to all disbursements contained therein and further release the firm and my attorney from further responsibility, duties and all liability with regard to this matter.

I certify that I am not aware of any Medicare/Medicaid/Workers Compensation payments (other than any listed above) that have been paid for any services rendered due to the injuries I have received in this case.

I am completely satisfied with the above compromise settlement, with the services of the firm and my attorney, and with the amount of the fee charged and with the expenses listed above.

I understand that I am responsible for all medical expenses incurred in connection with this incident. I specifically agree to indemnify and hold harmless the firm and my attorney for any expenses incurred in connection with this incident.

APPROVED:

R. Emerson Lee (Claimant) Date: _____

Attorney: Barry Smart (Attorney) Date: _____
Smart, Quick & Goode Law Firm

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