

## *Dan Jacobson*

### *Property/Casualty Insurance Expert*

#### Curriculum Vitae

- *Bad Faith*
- *Claims Handling*
- *Standard of Care*
- *Policy Analysis*
- *Claims Analysis*



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Dan Jacobson, Property/Casualty Insurance Expert

- \*\*\* Member of the California Board of Accountancy, which licenses, polices, and sets regulations for all of California's CPAs and CPA firms
- \*\*\* Chair of the California Board of Accountancy's Committee on Professional Conduct
- \*\*\* Governor of the California Insurance Guarantee Association ("CIGA") (Ret.)
- \*\*\* Claims Attorney for 16 years
- \*\*\* Directly employed by insurance companies for 6 ½ years
- \*\*\* Author of scholarly articles on insurance, and co-author of Lorman Educational Services Text on Claims Handling
- \*\*\* Lecturer on claims handling and related topics

### California Board of Accountancy, Member

Mr. Jacobson is Member of the State Board that licenses, polices, and sets regulations for all of California's accountants and accounting firms. He was appointed to that post by Assembly Speaker Anthony Rendon, who has entrusted Mr. Jacobson with the major responsibility of overseeing California's accounting profession.

Mr. Jacobson chairs Accountancy Board's Committee on Professional Conduct.

### California Insurance Guarantee Association ("CIGA") Governor (Ret.)

In 2002 the Legislature created a seat on its Board of Governors for "one business member." In that same year Now-Congressman John Garamendi was re-elected Insurance Commissioner. Commissioner Garamendi needed a member of the business community who was also an experienced insurance person to fill this position. He turned to Dan Jacobson, who took his seat on the CIGA Board of Governors on June 30, 2006.

As a member of the CIGA Board of Governors Mr. Jacobson instituted numerous reforms to CIGA's claims procedures.

### Claims Attorney for 16 years

For 16 years Mr. Jacobson was retained by numerous insurance claims departments to represent insureds, on hundreds of claims. The types of claims ran the gambit from construction defect claims to food poisoning claims. Mr. Jacobson's experience in working closely with the claims departments of various insurers gave invaluable insight into the practical day-to-day issues faces by claims representatives.

### Directly employed by insurance companies for 6 ½ years

Mr. Jacobson was directly employed as a claims attorney by Golden Eagle Insurance Company and OneBeacon Insurance Company for a total of 6 ½ years.

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## Author of scholarly articles on insurance, and co-author of Lorman Educational Services Text on Claims Handling

Mr. Jacobson is an accomplished scholarly writer. In the area of insurance, he has written articles for the *San Francisco Daily Journal* and the *Los Angeles Daily Journal*, and *Orange County Lawyer*. He has also co-authored a text for Lorman's Education Services "Construction Project Operations," a text on California construction claims.

"The Answer is: Ask the Question" Dan Jacobson, *Orange County Lawyer*, 02/17, page 48. A critical look at an analysis that failed to examine a vital issue, thus providing an important lesson is legal analysis.

"Insurers Can't Escape Through Escape Clause" Dan Jacobson, *Orange County Lawyer*, 02/16, page 4. LEXIS citation not yet available. An analysis of wary view of "other insurance clauses" in insurance policies.

"The Emperor Has No Completed Operations", Dan Jacobson, *Orange County Lawyer*, 07/14, Page 28 . An Analysis of California's courts exasperation with insurance companies Completed Operations clauses.

"The Armstrong Election– a Misnomer with a Powerful Purpose" Dan Jacobson, *Orange County Lawyer*, 09 Vol. 53, No. 9, 2011 Page 16; LEXIS citation: 53 Orange County Lawyer 16. An analysis of the California law that prohibits "stacking" of insurance deductibles in progressively deteriorating damages cases and allows an insured in such cases to elect which deductible it will pay.

"Insurer Learns It Can't Wriggle Out of Its Duty to Defend" 09/29/06 The Daily Journal. An analysis of The Standard Fire case, in which the California Court of Appeal defined "occurrence" in the context of an occurrence-based insurance policy, thus distinguishing such a policy from an claims-made insurance policy.

"Construction Defect Claims – Defining, Comparing and Contrasting the Differing Roles of the Adjuster and Attorney in Protecting the Contractor – The Attorney's Role," published by Lorman Education Service. An analysis of California law re the different roles that Claims Adjusters and Claims Attorneys play in protecting an insured.

"Insurance Insolvency – Or What to Do If Your Insurance Company Goes Broke," published by Lorman Education Service. An analysis of California law on insurance insolvency, including an analysis of the California Insurance Guarantee Association ("CIGA").

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### Lecturer on claims handling and related topics

Mr. Jacobson is an adjunct professor of Contract Law at Pacific West College of Law. As all insurance policies are contracts, teaching contracts for many years adds to Mr. Jacobson's understanding of claims handling.

Mr. Jacobson has lectured for Lorman's Education Services on the topics of "Construction Defect Claims – Defining, Comparing and Contrasting the Differing Roles of the Adjuster and Attorney in Protecting the Contractor," and "Insurance Insolvency – Or What to Do if you Insurance Company Goes Broke."

### Study of California Code of Regulations, sections that relate to claims handling

Mr. Jacobson has conducted an extensive study of the California Code of Regulations that relate to claims handling.

### Affiliations

Member, California Board of Accountancy  
Chair, Board of Accountancy's Committee on Professional Conduct  
Immediate-Past Chair, Democratic Foundation of Orange County  
Governor of the California Insurance Guarantee Association (CIGA) (Ret.)  
Director, Richard and Donna O'Neill Land Conservancy (Ret.)  
Member, Orange County Trial Lawyers Association  
Member, California State Bar  
Member, Orange County Bar Association  
Lifetime Member, Friends of the Tustin Library  
Director, Nanette Brody Dance Theater (Ret.)  
Vice-Chair, Long Beach Commission on Youth (Ret.)  
Member, Sea and Sage Audubon Society