



# Representation + Warranty Claim Settlement

## Case Study

### Background

Following a long working capital settlement process, our client filed a claim on the representation and warranty policy issued on an acquisition from 2018. This required significant efforts to recreate and investigate what was verifiably known to be considered a primary breach.

### Objectives

- + Evaluate each assertion made by claimant and accumulate support
- + Build tie-out and databook to represent claimant damage assertions
- + Prepare memo communicating claimant positions on each assertion
- + Represent claimant as insurer performed due diligence for each assertion
- + Provide guidance on interaction, strategy, and negotiation with insurer

### Solutions

- + Build tie-out, databook, and memo, providing claimant assertions
- + Represented the claimant in months-long diligence process undertaken by insurer
- + Supported successful negotiation outcome for claimants

**Distribution**  
INDUSTRY

**1,000**  
EMPLOYEES

**\$150M**  
ANNUAL  
REVENUE

**Successfully collected  
\$4.2 million of cash  
on representation + warranty claim.**

