

**CATHY JACKSON LERMAN, Esq.**  
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Cathy Jackson Lerman, PA  
**Principal**

March 2011-Present

Diverse corporate and commercial legal practice providing a wide range of legal services for healthcare, elder care, wills, probate, ethics, and regulatory matters. Contract and lease review and negotiation, preparation of documents and negotiation of complex corporate transactions, joint ventures, outsourcing, strategic alliances, privacy and security issues, advertising and marketing regulatory guidance, employment law and human resource issues, intellectual property management, and related litigation/arbitration.

Green Bullion Financial Services, LLC

December 2008- March 2011

**General Counsel, Executive Vice President of Human Resources and Chief Compliance Officer**

Recruited by outside counsel to spearhead development and implementation of Legal, Compliance and Human Resource functions for this international direct marketing company.

- Provide day-to-day executive management of domestic and international Operations, Risk Management, Human Resources, Public Relations, governmental permitting and Customer Service.
- Catalyst for introduction of various technological, process and operating improvements impacting the entire organization including quality assurance measures, training, risk and litigation management, AML compliance, cost reduction initiatives, staff development and training and technology utilization.
- Review, negotiate and draft contracts, agreements for sales, distribution, professional services and customer support, review and advice on non-standard terms and conditions of sale that may be proposed in US, United Kingdom, France, Italy, Germany, Spain and Belgium.
- Ensure that business and transactions are in compliance with commercial, consumer and other substantive laws that may affect the worldwide business including marketing, employment and data protection as well as compliance with all national government and regulatory requirements in the relevant countries.
- Administer corporate governance matters in U.S. and throughout corporate offices in the European Union.
- Train and educate sales staff, finance, marketing and other support functions in contract law, sales and marketing law as well as regulatory requirements worldwide.
- Draft and review press releases and serve as corporate liaison with law enforcement, Better Business Bureau, State Attorneys General, European regulatory agencies and media.

Homes.org LLC/Saveology LLC

September 2006-December 2008

**Senior Vice President and General Counsel**

Provide executive direction of all legal functions on a corporate-wide basis for this internet-focused, multi-site marketing corporation with multiple call centers, including advising the Board of Directors, Officers, and management staff.

- Negotiate business and legal terms for service partners, vendors, software licensing and e-commerce agreements, partnership and affiliation agreements, intellectual property licensing, and leasing agreements. Retain outside legal counsel as necessary; coordinate and monitor work of outside legal counsel.
- Key member of Executive team responsible for planning and launch of re-branding marketing strategy.
- Negotiated multiple marketing agreements for re-branding initiative including online banner advertising, SEO strategy, television, radio and online viral marketing campaigns.
- Manage and support the following Operational Functions: Legal, Compliance, Training, QA, IT, Risk Management, Call Center Operations, Human Resources, Investor Relations, Public Relations and Recruitment. Developed and implemented Employee Human Resources Handbook, and Operational Policies and Procedures for Management and Executives. Created and implemented Training Department and Training Program including development of training modules for Human Resources, Compliance/Ethics Training, Sales, Quality Assurance, and Management Training.
- Determine performance objectives/ metrics, define tools and ensure consistent achievement of service level objectives.
- Analyze and review process metrics, related performance data and work flows to define or update processes through benchmarking with external and internal business partners.
- Provide strategic leadership, guidance and tactical direction to areas of core operations.

ADP, Inc.

October 2003- August 2006

**Senior Corporate Counsel**

Responsible for drafting and negotiating corporate contracts, client service agreements, licensing agreements, vendor and consulting agreements, all technology and e-commerce agreements including hardware and software licensing agreements, press releases and marketing documents, partnership and affiliation agreements, distribution agreements, mergers and acquisitions, real estate and commercial leasing agreements, collections, intellectual property licensing and protection, compliance, tax and risk management.

- Also primarily responsible for providing legal guidance on all benefit issues including training, ERISA compliance, COBRA regulations, 401k, domestic partner issues, union and collective bargaining agreements and review of all carrier and benefit provider contracts.
- Provide counsel on Sarbanes-Oxley compliance for contracts and other corporate documents, manage complex litigation matters, employment law issues and advise business units as to the application of laws and regulations to the development of new products and services.
- Provide legal guidance and counsel on all benefit plans, health and welfare plans, ERISA, COBRA and state law benefit issues for over 125,000 worksite employees
- Conduct internal investigations, resolve customer complaints and handle internal employee relations issues.
- Develop and implement on-line training modules for human resource, benefit and compliance functions.

OPI, Inc. January 2000- October 2003  
**Executive Vice President of Human Resources, Compliance Officer and General Counsel**

Review, draft and negotiate corporate and service contracts, licensing, technology, real estate, commercial leasing and supplier and vendor agreements for this health care services provider.

- Responsible for providing legal advice and assistance on matters related to intellectual property, compliance issues, collection of accounts, marketing and sales as well as risk management issues.
- Handle due diligence and preparation of documents for all acquisitions, partnerships and joint venture agreements.
- Responsible for claims and litigation management including unemployment, workers' compensation and EEOC issues.
- Responsible for all administrative operations including Technology, Training, Recruiting, Human Resources, Risk Management and Payroll.
- Served as Secretary to the Board of Directors. Company was sold in 2003.

LocalBusiness.com, Inc. June 1998- December 2000  
**Chief Executive Officer/Vice President of Human Resources and General Counsel**

Drafted, reviewed and negotiated all company contracts for this start-up on-line newspaper including strategic partnership agreements, content and advertising deals, software licensing agreements, co-branding contracts, marketing documents and distribution agreements, general corporate and real estate-related documents.

- Intimately involved in re-engineering of strategic direction and implementation of processes and programs to support rapid growth of this Internet media company.
- Completed first acquisition and directed several private placements of financing. Managed all claims, arbitration and litigation including collections, insurance issues and general commercial matters.
- Also served as Training Director, Risk Manager and 401k Plan Administrator. Developed and implemented Legal Department including contract review and approval process, litigation management and collections procedures.
- Served as Secretary to the Board of Directors. Selected by Board of Directors to serve as Chief Executive Officer when Company went into Chapter 11. Company's major assets were sold in 2001.

**Private Practice and In-House positions**

1982-1998

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### **Education**

- **M.B.A.** (with honors) Regis University-1998
- **J.D.** (cum laude) Shepard Broad Law Center-1982
- **B.A.** (English Honors) Old Dominion University-1978

### **Activities and Memberships**

- Florida Bar

**Teaching Experience including E-Learning, Online, Classroom and Corporate Training:**

- Adjunct Professor: Nova Southeastern University Shepard Broad College of Law: Legal Accounting, Ethics, Legal Writing and Research-Online and Classroom
- Adjunct Professor: Nova Southeastern University: Employee and Labor Relations-Online and Classroom
- Adjunct Professor: University of Miami: MBA Program- Business Law-Classroom
- Adjunct Professor Kaplan University: Business Law and Legal Ethics-Online
- ADP, Inc: ERISA, Contracts, Ethics, Business Writing-E-learning-Online-Classroom
- PBS&J: Contracts, Professional Negligence, Insurance-Classroom

**Community Involvement**

- City of Coral Springs, Community Business Leaders Board
- Legal Aid Society of Broward County Volunteer
- Member, Broward County Contractor Licensing Board
- Volunteer, Chris Evert Children's Hospital
- Fundraiser, Sawgrass Wildlife Nature Center