



JIM CARLSON, BS MBA JD

Managing Principal

Education:

Juris Doctor: International Contract Law

William Howard Taft University

Master of Business Administration: Finance and Executive Management Negotiations

University of La Verne

Bachelor of Science: SHRM Operations Management

California State Polytechnic University-Pomona

Summary:

As Managing Principal of **Maximum Property Construction Services**, sister company to **Maximum Energy Professionals**, Jim brings more than 20 years of experience in owner's representation, surety claims, litigation, mediation, productivity plans, expert testimony, strategic programs, and construction oversight.

Specific technical knowledge and experience includes:

- Backup generator systems, PV arrays, ATS systems, and grid-tie connections
- Central boiler and chiller plants, distribution systems for chilled water, high temperature hot water, steam
- Retrofit and replacement for packaged AC units including boxcar type systems. Curb review, redesign, retrofit. Craning or helicopter installation of equipment
- Final wiring and startup for systems from 1-ton to 500- tons
- Mechanical cooling for primary pump motor systems and substations
- Steam turbine generators, geothermal, and multi-fuel generator backup systems
- Property condition assessments and partially constructed acquisition estimates
- OSHA 30 trained health and safety management

- EPA compliance for refrigerant and oils management and disposal, coordination for chain of custody on all aspects of abated equipment.
- Schedule reconstruction and impact analysis
- Energy management system design/installation
- Energy management system O&M training
- Equipment startup and power control retrofitting
- Electrical wiring installation review
- Emergency response for Physical Plant failures
- General construction and mechanical construction analysis as related to design, in field corrective measures to mitigate delays for in field conflicts
- Catastrophe claim construction, defect contract claims, and commercial property claims
- Surety claims investigation, cost to complete analysis, delay impact analysis, well versed in tendering, take over and completion, ratification of relevant sub-contractors, negotiation of terms for completion and augmentation of liquidated damages clauses. Payment and performance bond claims investigation, opinions and determination of reasonableness and merit of claims determination.

Summary of qualifications includes:

- Mentor employees at all levels, optimize employee development initiatives, and build a strong internal succession pipeline for employees looking to grow beyond field operations.
- Expert in surety and surety claims, owner's representation, litigation support, expert testimony, and mediation.
- Proven ability to work cross functionally with employees, management, and third-party vendors Advise on and implement actionable methodologies to achieve short and long-term technical goals.
- Develop productivity plans, strategic programs, policies, service lines, and execute planning sessions.

Construction Defect Expert Witness Summary:

Mr. Carlson has been assisting clients in manufacturing and construction defect expert witness support since 2001. A significant portion of the support occurred as a precipitant witness for matters that arose in the aerospace manufacturing business for both issues related to materials acquisition and process for aerospace production, as well as construction related claims for buildings held by the corporation that required remodeling. The balance of support has been reviewing evidence and producing expert third party opinions for construction related matters on insurance and surety related claims since 2012.

Construction Defect Expert Witness Sample Projects:

Solo Enterprise Corp matter with spindle repair, metal suppliers, processing houses, CHP for materials transit issues, EPA Subsurface investigation issues, improper drywall installation issues, improper HVAC installation and startup issues, improper upgrades for electrical issues.

Vertex matters that related to construction defect on Palms Hotel Las Vegas, LAUSD elementary school default, LA Trade Tech default, Sun Edison PV array default, Department of the Navy transformer upgrade default, Colorado Adult Education cost to complete analysis, VA construction default Waco, TX, defaulted HVAC contractor Glendale Community College, CA.

Partner matters related to construction defect and maintenance issues for a failed boiler plant in Fresno CA, HVAC installation defect claims in Portland Oregon, defaulted roadworks contractor at 19 sites in Northern CA, defaulted curtain wall installer in DTLA, defaulted HVAC contractor for Department of the Navy at Pointe Hueneme and Point Magu CA, defaulted GC for complete construction of changing rooms, restrooms, lifeguard station, parking lot Cape Cod, MA, alleged defect claim for flooring installation West Point Military Academy, NY.

Depositions

2001-2004

Solo Enterprise Corp matter involving metal supplier

Solo Enterprise Corp matter involving outside processing

Solo Enterprise Corp matter involving construction issues with drywall, electrical upgrade, HVAC installation and commissioning

2015

Insurance claim related to the death of a family member

2020

Partner Engineering and Science matter for surety on a defaulted general contractor claim for a failed boiler installation

Past Employment History:**Partner Engineering and Science, Torrance, CA 2017-2022**

Technical Director | Expert Witness | Subject Matter Expert, MEP

Oversaw and managed a team of 35 in house and retained talent from site superintendents through senior project managers and engineers, while coordinating technically complex projects and delivering outstanding professional services including mechanical systems/controls, electrical, and plumbing systems to support of primary utilities.

Created and launched surety claims business line. Responsible for client development, file intake, mobilization, negotiations, management, completion and subrogation support of claims. Managed \$175 million in bonded exposure.

Operated as a construction defect expert witness and litigation subject matter expert, and conducted preliminary plan reviews, construction quality control visits, MEP, site coordination, and surety completion work.

Created and launched Owners Rep services. Responsible for client development, proposals, site walks, overall team and project management. Oversaw \$250 million in Owners Rep construction activities.

The VERTEX Companies, Inc., Los Angeles, CA 2014-2017

Senior Project Manager | Expert Witness | Subject Matter Expert, MEP

Oversaw and managed technically complex projects while delivering outstanding professional services including mechanical systems and controls, electrical, and plumbing systems in support of primary operating utilities.

Undertook minor small repairs and service calls to large-scale multi-floor and building corporate restacks.

Operated as a construction defect expert witness and litigation subject matter expert, and handled preliminary plan review, construction safety quality control visits, MEP, site coordination, and surety completion work.

Worked with notable clients including Bonaventure Hotel, Holiday Inn, AAA, Warner Bros. Studios, 20th Century Fox, Cushman Wakefield, Majestic Realty, The Irvine Company, Sterling Development, and CBRE.

Spearheaded the boiler chiller upgrade project for Bonaventure hotel, including primary transformer upgrade from five to eight megawatts, and 33,500 volt to 4160 volt primary hotel power.

TDC Partners, AKML Middle East Doha, Qatar 2004-2014

President | Manager, Mechanical and Electrical Engineering

Oversaw daily operations and managed job sites for large commercial and public buildings, and conducted all planning, organizing, and directing both tenant improvement and facility rehabilitation forecasts and schedules.

Conducted pumping-lifting-forwarding station planning while organizing and directing both tenant improvement and facility rehabilitation schedules, as well as out of country materials sourcing/expediting.

Coordinated and reengineered 6600 tons of packaged AC, water sourced chillers, cooling towers, and heat exchange systems for Qatar Diar, VINCI, UDC, PEO, KahraMaa, ASHGAL, New Doha International Airport, and Qatar Music Academy.

Coordinated and designed the upgraded security camera and control system for the American School of Doha, an Embassy sponsored Education facility for the children of Expatriates.

Interfaced with the US Embassy, RSO, Deputy Chief Integrated strategic plans, and worked closely with senior management and other key personnel to facilitate and provide communication recommendations to senior leadership on issues and activities impacting the facility.

Executed crisis management strategies and preparedness techniques to coordinate and respond to emergency maintenance situations including power and water disruption, as well as temporary sanitary facilities.

Oversaw Procter & Gamble's tenant improvements such as lighting projects, break room build out, pyramid resurfacing, shipping/receiving remodel, and HVAC control tie-in, totaling \$11 million.

Conducted Sony Pictures' tenant improvements of complete TI renovation for additional offices and legal library, as well as restack (framing, electrical, and data) totaling \$12 million.

MEP experience working with Al Udeid Air Force Base in Qatar on construction and commissioning of pump lifting forwarding stations, the associated mechanical cooling for the primary pump motor systems, and the substation connection and cooling systems, totaling \$220 million.

Completed housing for Halul Refueling Terminal Island North Field Doha, Qatar with 2,500 laborers, 500 managers, and 25 executives, as well as helicopter landing pads/shelters, boat docks, boat houses, gas/chemical sensors, along with emergency evacuation systems, totaling \$125 million.

Prepared estimates and schedules according to client objectives and timelines in compliance with ADA specs.

Forecasted and budgeted operations, pulled permits and coordinated inspections for building code compliance, while hiring and training all levels of staff to the highest standard of service.

Managed sub-contractor, vendor, and client relationships, while handling monthly R&M walks with clients to establish hierarchy of priority for project objectives to be accomplished.

Autonomy Corporation, Los Angeles CA 2003-2005

CFO/COO:

Maintained general ledger, accounts payable/receivable, cash flow, BS integrator system, and profit and loss analysis.

Handled all month end activities including bank reconciliations, monthly P&L production, quarterly reports, 940 and 941 filings, as well as forecasting future quarter financials.

Determined client payment terms, handling collections/milestone payments, and legal for collections.

Oversaw year-end accounting functions, financials for audit/tax preparation, and produced 1099's and W-2's.

License holder for all construction on lot, off lot, shoot stages, including coordinating with permitting at the building department and coordination with fire and police to support live action and stage shoots.

Solo Enterprise Corporation, Los Angeles, CA 2000-2003

COO:

Maintained compliance with SOX, AS9100, D-19000, ISO 9000, defense acquisition requirements (DAR), federal acquisition requirements (FAR) for accountancy and GAAP requirements.

Oversaw IT issues including network and software compliance/upgrades, and managed all real estate holdings, rents, contracts, lease agreements, and legal documents for the president. Determined credit worth, and handled collections issues including background checks and hiring procedures.

Maintained and implemented annual budgeting and financial records, and oversaw the general ledger, accounts payable/receivable, cash flow, BS integrator system, and profit and loss analysis.

Oversaw all construction and operations for all company properties.

Certifications and Specialized Training:

EPA 608A Universal Refrigerant License

Licensed HVAC Contractor (C20)

Licensed General Contractor (B)

Certified in OSHA 10 and 30

Certified Honeywell Contractor

