

JOSEPH SOBCZAK, CVA

Damages Expert

joseph@quantumbravo.com

916-759-2099

www.quantumbravo.com

PROFESSIONAL SUMMARY

Commercial damages analyst with deep experience supporting expert witnesses in quantifying economic harm across state and federal courts nationwide. Built career at Ocean Tomo — one of the country's foremost IP and financial expert services firms — serving as lead analyst on 50+ engagements spanning patent, copyright, trade secret, breach of contract, fraud, and unjust enrichment matters. Lead analyst supporting the testifying expert on a patent infringement matter resulting in a \$17 million jury award. Currently managing partner of Quantum Bravo LLC, available for both non-testifying consulting engagements (under Kovel arrangement) and standard retained expert testimony, and co-founding partner of Olive Stone LLC, a business valuation and M&A advisory firm.

CREDENTIALS & KEY METRICS

Certification:	Certified Valuation Analyst (CVA) — NACVA · Credential ID: 1036077
Education:	Bachelor of Science, Business — Brigham Young University (Summa Cum Laude)
Engagements:	50+ damages engagements in state and federal courts
Jury Award:	\$17 million (lead analyst supporting testifying expert, patent infringement, federal)
Practice Areas:	IP infringement, breach of contract, fraud/unjust enrichment, lost profits
Industries:	SaaS, Computer Hardware, Consumer Products, Construction

PROFESSIONAL EXPERIENCE

Managing Partner · Quantum Bravo LLC Jul 2024 – Present

- Available for both non-testifying consulting engagements (structured under Kovel arrangements) and standard retained expert testimony engagements, depending on counsel's strategic preference.
- Kovel engagements preserve attorney-client privilege and work product protection throughout the engagement lifecycle.
- Practice areas: IP infringement (patent, copyright, trade secret), breach of contract, fraud and unjust enrichment, and lost profits.
- Active engagements include patent infringement (reasonable royalty, Georgia-Pacific framework), copyright (statutory damages, defendants' profits), and Lanham Act / right of publicity matters.
- Developed proprietary damages modeling infrastructure, outreach systems, and engagement agreement architecture optimized for contingency practice.

Managing Partner · Olive Stone LLC Nov 2025 – Present

- Co-founded a Utah-based advisory firm combining buy-side M&A advisory for lower middle market transactions with business valuation and financial forensics services.
- Valuation practice serves attorneys (divorce, probate, estate, shareholder disputes), SBA lenders (SOP 50 10 compliance), and private company owners in transaction contexts.
- Co-authored CVA case study involving minority interest valuation with DLOM analysis using the Quantitative Marketability Discount Model (QMDM).
- M&A advisory engagements include deal structuring, NDA negotiation, and buyer-seller transaction management for lower middle market targets.

Advisor · Client IQ Aug 2025 – Present

- AI communication advisor supporting law practices in deploying AI-assisted client communication tools.

Associate · Truest Consulting Aug 2023 – Sep 2024

- Quantified economic damages across a broad range of commercial disputes including contract, tort, and IP matters.
- Prepared financial analyses, damages models, and expert support materials for use in state and federal court proceedings.

Senior Analyst · Ocean Tomo

Sep 2020 – Jul 2023

- Built career at one of the most respected IP and financial expert services firms in the country (San Francisco, CA).
- Quantified economic damages in complex, corporate litigation across 50+ engagements in a wide variety of industries including technology, entertainment, consumer products, and life sciences.
- Served as lead analyst supporting the testifying expert on a patent infringement matter (Patent Holder v. Large Computer Manufacturer) resulting in a \$17M+ jury award — exactly the figure presented in the damages model.
- Analyzed complex royalty damages in a copyright matter (Large Music Publisher v. Music Streaming Service); reviewed intricate licensing contracts and produced a defensible reasonable royalty opinion supporting a favorable settlement.
- Computed lost profits and unjust enrichment damages in a breach of contract / tortious interference matter (Venture-Backed Tech Firm v. Fortune 500 Consumer Products Firm); matter resolved in a favorable settlement.
- Highest-compensated analyst at firm during tenure; promoted to Senior Analyst after two years.

EDUCATION

Bachelor of Science, Business · Brigham Young University

- Summa Cum Laude
- Warren Rollins and Murdell Hull Fund Award Recipient, 2020
- Merrill J. Bateman Award Recipient, 2020
- Hyrum Smith Scholarship · Brigham Young Scholarship

REPRESENTATIVE MATTERS

Patent Infringement — Reasonable Royalty — Federal Court · \$17M+ Jury Award

Lead analyst supporting testifying expert. Computed reasonable patent royalties across thousands of infringing computer products. Analyzed SKU-level sales records, performed cost analysis for representative infringing products, and built the royalty base and rate model adopted by the jury.

Breach of Contract / Tortious Interference — Lost Profits — Federal Court · Favorable Settlement

Lead analyst. Computed lost profits arising from a subcontractor's conduct causing a Fortune 500 end client to breach a multi-million dollar software development contract. Analysis included historical churn rates, renewal probability, incremental costs, and attribution.

Copyright Infringement — Reasonable Royalty — Music Streaming · Favorable Settlement

Lead analyst. Analyzed royalty damages arising from unlicensed music streaming. Reviewed complex licensing contracts and produced a statutory damages and reasonable royalty opinion supporting a favorable resolution for the music streaming client.

PUBLICATIONS

What is the Proper Royalty Base for an SEP License?

The Licensing Journal · July 2021
