BEFORE THE FINANCIAL INDUSTRY REGULATORY AUTHORITY ("FINRA")

JORDAN TEPPER WEINER and TERRI P. TEPPER,

FINRA Case No. 24-02286

Claimants,

-against-

OPPENHEIMER & CO., INC.,

MOTION TO QUALIFY DR. AMI P. DESAI AS EXPERT WITNESS

Claimants Terri P. Tepper, with Jordan Tepper Weiner being the son of Terri P. Tepper and representing both parties in lieu of an attorney as permitted under FINRA rules, hereby move the Financial Industry Regulatory Authority ("FINRA") Panel to qualify Dr. Ami P. Desai as an expert witness in the field of Internal Medicine in FINRA Case No. 24-02286, and in support thereof state as follows:

II. QUALIFICATIONS OF DR. AMI P. DESAI

Dr. Ami P. Desai possesses the following qualifications that render her testimony reliable and relevant to the matters at issue:

1. Education: Dr. Desai earned her Doctor of Medicine (M.D.) degree from the University of Illinois, Chicago in 2002.
2. Board Certification: Dr. Desai has been board-certified in Internal Medicine by the American Board of Internal Medicine since October 2015.
3. Clinical Experience: Dr. Desai has nearly two decades of clinical experience, including:
    - Current position as Internal Medicine Physician at Ami Desai MD SC (November 2023-present)
    - Internal Medicine Physician at Michigan Avenue Internist (October 2006-October 2023)
    - Attending Physician at Northwestern Memorial Hospital (July 2005-present)
    - Attending Physician at Jesse Brown VA Hospital (July 2005-present)
4. Academic Appointments: Dr. Desai has held academic appointments at Northwestern University since 2005, progressing from Instructor to her current role as Assistant Professor, which she has held since September 2011.
5. Postgraduate Training: Dr. Desai completed her residency at Northwestern University, McGaw Medical Center (Northwestern Memorial Hospital) and served as Chief Medical Resident from June 2005 to June 2006.
6. Recognition of Excellence: Dr. Desai has received multiple honors and awards throughout her career, including:

- Recognition as a "Chicago Top Doctor" by Castle Connolly Guide to Chicago's Top Physicians in 2018, 2021, 2022, and 2023
- Excellence in Teaching awards from the Department of Medicine, Feinberg School of Medicine in 2010, 2016, and 2022
- The Rambach Award for Best Overall Performance by a Medical Intern (2003)

7. Publications: Dr. Desai has authored peer-reviewed publications in respected medical journals, including the Journal of General Internal Medicine and the American Journal of Medical Sciences.
8. Professional Membership: Dr. Desai has been a Fellow of the American College of Physicians since March 2011, an organization that emphasizes continuing education in all aspects of internal medicine.
9. Teaching Experience: Dr. Desai has extensive teaching experience, including:
    - Precepting medical residents in her clinic since 2011
    - Supervising inpatient medicine
    - Serving as Co-Director for the Senior Student Clerkship at Feinberg School of Medicine
10. Institutional Service: Dr. Desai has served as a Member of Medical Peer Review at Northwestern Memorial Hospital since June 2019.

Respectfully submitted,

Jordan Tepper Weiner

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CERTIFICATE OF SERVICE