

TEMPLATE 9 · EXPERT

Expert Witness AI Disclosure Supplement to Rule 26(a)(2)

CASE CAPTION

| | |
|--------------------------|----------------------|
| Court | Case no. |
| Plaintiff(s) | Defendant(s) |
| Judge | Magistrate / related |
| Filing certified (title) | Dkt. |

FILER

| | | |
|--------------------------|-------------------------------|-------|
| Attorney name | Bar no. | State |
| Firm | Role (e.g., lead, co-counsel) | |
| Client (or redacted id.) | Date of certification | |

EXPERT IDENTIFICATION

| | | |
|-----------------|-------------------|-------------|
| Expert name | Field / specialty | |
| Retaining party | Engagement date | Report date |

EXPERT'S AI USE

Identify each generative or analytical AI tool the expert used in connection with the formation of opinions, the preparation of the expert report, the analysis of underlying data, or the preparation of demonstratives.

| | | |
|------------------------|-----------------|---------|
| Expert tool 1 — vendor | Product / model | Version |
| Task performed by AI | | |
| Expert tool 2 — vendor | Product / model | Version |

Task performed by AI

| Expert tool 3 — vendor | Product / model | Version |
|------------------------|-----------------|---------|
|------------------------|-----------------|---------|

Task performed by AI

METHODOLOGY DISCLOSURE

Description of how AI output was incorporated into the expert's opinions, including (i) the inputs the expert provided to the tool; (ii) the outputs the tool produced; (iii) the expert's independent verification of those outputs; and (iv) any reliance on AI output as part of the basis for the expert's opinions under Federal Rule of Evidence 702 / Daubert.

VERIFICATION & RELIABILITY

- The expert verified each AI-generated factual proposition against primary sources and disclosed the verification methodology in the report.
- The expert verified each AI-generated citation, dataset, or calculation against primary sources.
- The expert can replicate the AI's outputs sufficiently to satisfy Federal Rule of Evidence 702(b)–(d).
- Confidential client or matter information was not entered into any AI tool lacking a contractual zero-retention commitment.

ATTORNEY SUPERVISION CERTIFICATION

Pursuant to Model Rule of Professional Conduct 5.3 and Kohls v. Ellison, No. 24-CV-3754, 2025 WL 66514 (D. Minn. Jan. 10, 2025), the undersigned counsel certifies that counsel has inquired of the above-named expert regarding the expert's use of generative AI in the preparation of the expert's report or testimony, has received the representations summarized above, and has confirmed to counsel's satisfaction that the expert's methodology is consistent with the duty of candor owed to the tribunal and with the reliability requirements of Federal Rule of Evidence 702.

Kohls compliance

In Kohls v. Ellison, the District of Minnesota held that 'counsel has an affirmative duty to disclose the use of artificial intelligence' in expert materials. This template satisfies that duty. The expert should also separately attest in the body of the Rule 26(a)(2)(B) report; this supplement does not replace the report's required disclosures.

SIGNATURE — COUNSEL

Signature

Printed name

Bar no.

Firm

Date

Email

Phone

CERTIFICATION — EXPERT

I, the above-named expert, certify under penalty of perjury that the disclosures and representations on this supplement regarding my use of generative artificial intelligence are true and correct to the best of my knowledge.

Expert signature

Expert printed name

Date

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