



FINANCIAL POISE WEBINAR ONE SHEET CRYPTO, CROWDFUNDING & OTHER CRAZY CONCEPTS - 2019

ABOUT THIS SERIES

Two “crazy” concepts, but crazy how? What is money and why is cryptocurrency different, in paying for goods and services and as currency for the performance of commercial contracts? Should I (or my clients) enter the “crowd” in crowdfinance, and thus get in on start-ups that scale into unicorns? For investors, each of these concepts implies assets not correlated with returns from index funds that invest only in public securities. So there are opportunities to do better than “the markets.” However, these concepts are also associated with actual examples of large-scale fraud or at least fear of fraud. Are crypto and crowdfinance investments crazy-beneficial (notwithstanding the presence of risk) or just crazy? This series seeks to give professionals, investors, users, and their advisors useful insight into relevant opportunities and risks.

As with every Financial Poise Webinar, each episode is delivered in Plain English understandable to you even if you don’t have a background in this area. And, as with every Financial Poise Webinar, each episode brings you into engaging, sometimes humorous, conversations designed to entertain as it teaches. Each episode in the series is designed to be viewed independently of the other episodes so that participants will enhance their knowledge of this area whether they attend one, some, or all episodes.

About Episode #1

Crypto Currency-101

April 30, 2019 at 2:00 PM CST

What is money? How is cryptocurrency different? Is permitting or requiring crypto payment of contracts sound from a legal or accounting perspective? How will the underlying technology of blockchain bear upon future commercial practices? What are you or your client investing in when investing in cryptocurrency? What is an initial coin offering (or ICO), and what are the legal risks involved? Federal regulators have defined cryptocurrency as commodity in one context, and as a security in others. In this introduction to cryptocurrency, panelists active in the field will discuss cryptocurrency as payment mechanism and as investment, with peculiar risks and opportunities. We



will discuss the history and adoption of cryptocurrency, as well as the underlying technology (including blockchain, but we will not make your eyes water), cybersecurity, and fraud.

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About Episode #2

Crowdfinance-101

June 4, 2019 at 2:00 PM CST

What is the “crowd” in Crowdfinance? What does the crowd thus buy and by what means and modes? And why should the crowd do this rather than put its money to work otherwise? What are the old (and continuing) modes for marketing and selling private securities? What is it like to purchase private securities from on-line portals? How are risks of fraud and mistake allocated there? Do on-line portals help get the rest of us in on unicorns in utero? How are equity securities purchased by the crowd turned into money? Is there a secondary market for private securities? Should ICOs be understood as crowdfinance by other means?

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