

FINANCIAL POISE WEBINAR ONE SHEET VALUATION 2020

ABOUT THIS SERIES

This series of webinars teaches how commercial litigators use valuation experts in commercial disputes.

Valuation is used by market participants to determine the price they are willing to pay or receive to transact a sale of a security, a business, or any other asset. The same techniques are used to determine the price a party is willing to pay or receive to settle a claim or satisfy a liability.

It should be no surprise then that when there is a dispute between two or more parties regarding value, the same valuation techniques and skills are necessary to resolve the dispute. Attorneys, accountants and business owners often rely on independent, third-party valuation experts to assist in the resolution of disputes or potential conflict situations.

Some of the typical situations in which valuation experts are utilized include fair value financial reporting (GAAP accounting), bankruptcy, income tax reporting, property tax appeals, estate and gift tax planning and reporting, dissenting shareholder disputes, corporate transactions and disputes, divorce litigation, shareholder disputes or economic damages analysis as well as many other business and legal purposes.

As with every Financial Poise Webinar, each episode is delivered in Plain English understandable to investors, business owners, and executives without much background in these areas, yet is also valuable to attorneys, accountants, and other seasoned professionals. 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

Experts: When Do You Need One & Where Do You Get One?

January 30, 2020 at 1:00 PM CST



A dispute regarding the value of a business or business interest, other asset, or liability can often lead to litigation. When do you need a valuation expert?

An independent, third-party expert is not necessarily required during the negotiation process although it may be helpful. Once you head to litigation, an expert is all but required.

Are there credentials that are useful in identifying the appropriate expert? Are all credentialed experts the same or are there advantages to one over another? The process of selecting the right expert begins with identifying the issues in dispute. This webinar will help you by identifying and explaining key factors that you should consider in selecting an expert for your litigation circumstances.

This webinar is delivered in Plain English, understandable to you even if you do not have a background in the subject. It brings you into an engaging, even sometimes humorous, conversation designed to entertain as it teaches. And, it is specifically designed to be viewed as a stand-alone webinar, meaning that you do not have to view the other webinars in the series to get a lot out of it.

About Episode #2

The Basics: Working with an Expert

February 27, 2020 at 1:00 PM CST

This webinar is for the litigator who has not worked with an expert before or who otherwise would like some review. What's the difference between a consulting expert and a testifying witness? How do you make sure your *proposed* expert will be *accepted* as an expert by the court? How do you protect your communications with your expert? What is an *expert report* and what can you do to make sure it is excellent? How do you plan your direct exam of your expert? How do you plan for redirect? This webinar addresses these topics.

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About Episode #3

Valuing Lost Profits for Litigation Purposes

March 26, 2020 at 1:00 (M CST)

A competitor, contractor or other third party has taken actions that have damaged your client's business in the form of lost profits. How do you measure the lost profits? Must you demonstrate lost profits with certainty? Over what period do you measure the lost profits? If your client has not recovered fully, can you include estimated future lost profits? These are all important questions in a lost profits case. This webinar addresses those questions and summarizes the different methods to measure lost profits, as well as some of the critical elements that must be considered in developing and presenting your damages theory in court.

This webinar is delivered in Plain English, understandable to you even if you do not have a background in the subject. It brings you into an engaging, even sometimes humorous, conversation designed to entertain as it teaches. And, it is specifically designed to be viewed as a stand-alone webinar, meaning that you do not have to view the other webinars in the series to get a lot out of it.