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Financial Statement Analysis & Business Valuation for Lawyers

Monday, June 22, 2015

Live in-person

1:00 pm – 4:00 pm (Eastern)

Global Knowledge Training Centre
2 Bloor St. E., 31st Floor (Yonge & Bloor)
Toronto • ON

Live webcast on your computer

with free 30 day replay

10:00 am – 1:00 pm (Pacific)

11:00 am – 2:00 pm (Mountain)

12:00 pm – 3:00 pm (Central)

1:00 pm – 4:00 pm (Eastern)

2:00 pm – 5:00 pm (Atlantic)

This webcast allows for live interaction between attendees and the presenter, including the ability to ask questions by web chat, and receive live answers by video. SK attendees please verify whether you align with Central (MB) or Mountain (AB) time based on season and location.

Who Should Attend

This course is designed for lawyers who want to hone their financial statement analysis abilities. This course is not a basic introduction to financial statements. Lawyers with little or no knowledge of financial statements should first attend *Introduction to Financial Statements for Lawyers*, offered as a live webcast replay on May 14, 2015.

About the Program

Today's clients demand that lawyers understand the value and financial reporting of a business – whether in relation to mergers and acquisitions, shareholder disputes, estates and gifts, marital assets, regulatory filings or other legal matters. This course will help lawyers who regularly deal with financial information better understand how to analyze and interpret financial statements, so you can formulate successful inquiries, and communicate more effectively with business and financial professionals. Drawing upon the basic concepts covered in *Introduction to Financial Statements for Lawyers*, instructor Joe Novello (CPA, MBA) will teach you how to assess the financial position and operating performance of a company, understand the basic approaches to valuing a company, and identify warning signs of potential financial fraud. Joe's simple, proven approach to financial education has helped lawyers throughout North America better serve their clients – and now it will help you!

Program Schedule (Eastern)

1:00 pm	<i>Welcome and introduction</i>
1:05 pm	Financial Statements Review
1:15 pm	Key Numbers and Ratios <ul style="list-style-type: none">• Earnings per share (EPS); Price/earnings (PE) ratio; Revenue and earnings growth; Financial ratios - liquidity, solvency, profitability
1:45 pm	Present Value Concepts and Business Valuations <ul style="list-style-type: none">• Simple present value• Why do you need to value a business?• Business valuation methodologies• Resources geared toward lawyers
2:30 pm	<i>Break</i>
2:45 pm	Present Value Concepts and Business Valuations Cont'd
3:00 pm	The Lawyer's Role in Financial Audits
3:20 pm	Basic Concepts of Financial Investment <ul style="list-style-type: none">• Risk vs. return• Modern portfolio theory and diversification
3:40 pm	Financial Fraud Schemes
3:50 pm	Questions and Answers
3:55 pm	<i>Wrap up and program evaluation</i>

Here's what past attendees have said about Joe Novello's programs:

- "Very impressed with Joe's financial acumen and his ability to share that knowledge with non-financial people."
- "What a great program. Joe was entertaining and totally committed."
- "Really good...Explanations and examples made the materials easy to understand."
- "Great example of how a good teacher can make all the difference...covered the material very effectively."
- "Excellent speaker and materials. Useful far beyond the practice of law."



ON: This program is eligible for up to 3.0 Substantive hours

BC & SK: This program is approved for 3.0 CPD hours

NB: This program is approved for 2.5 CPD hours

Lawyers in all other mandatory CPD jurisdictions may count their actual attendance at the program towards their CPD requirement

Seminar Partners is an Accredited Provider of Professionalism Content by the Law Society of Upper Canada, and a pre-approved CPD Provider of the Law Society of British Columbia.

Meet Your Presenter



Joe Novello began his career in accounting and management consulting at Ernst & Young in New York City. He obtained his CPA license in New York and his MBA in Finance from New York University. Joe's wealth of experience was gained

with American and international Fortune 500 companies as Controller, CFO and in other positions. Since founding the Financial Training Organization in 2010, Joe has presented his finance programs to hundreds of lawyers through bar associations in 13 U.S. states and Canada. His goal is to share an easy-to-understand approach that will make dealing with a client's financial matters more manageable. He brings his real world experience to his programs, and is consistently rated as exceeding expectations.

Double up and Save!

Register for this program and Introduction to Financial Statements for Lawyers (webcast replay, May 14, 2015) and save 15% on both programs.

✓ **Yes, I want to attend *Financial Statement Analysis and Business Valuation for Lawyers***

Choose your learning format: **Live in-person** **OR** **Live webcast with replay***

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* Materials will be distributed electronically in advance. Live webcast includes free video replay for up to 30 days after the program. Replay link will be made available 2 to 3 working days after the program. Webcasts cannot replicate the quality or rich interaction of in-person attendance.

REGISTRATION FEE (with ON HST*):

On or before May 20, 2015: \$350.00 + \$45.50 (13%) HST* = \$395.50 – Save \$40.00!

After May 20, 2015: \$390.00 + \$50.70 (13%) HST* = \$440.70

*If paying by cheque, adjust tax based on attendee's province as follows: 5% in AB, BC, MB, NWT, NU, SK, YK. 13% in NB, NL, ON. 14% in PEI. 15% in NS.

Register online: <http://seminarpartners.ca/register-for-courses/>

Register by mail, fax or phone: Return this form with payment to Jennifer Snoyer, Finance and Communications Coordinator, Seminar Partners, 110 Eglinton Ave. W., Suite 303A, Toronto, ON M4R 1A3 Tel. 1.866.606.4212 or 647.352.8633 Fax 647.352.8533. Email: jennifer@seminarpartners.ca. Registration fee is refundable less \$50 admin fee if written cancellation received 10 working days before the program. No refunds will be made after the cancellation date. Program content, speakers and location may change without notice. See website for all policies. In the event of program cancellation, Seminar Partners' liability is limited to refund of registration fees. GST/HST #848208492

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