Finance for Lawyers with Joseph Novello
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Friday, April 16, 2021
9 a.m.–4:15 p.m.
Pacific Daylight Time (PDT)

LIVE WEBCAST
CLE credits: 6 Practical Skills
MCLE ID #: 77638

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LIVE WEBCAST REGISTRATION

$125  ONLD member
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Includes online access to recorded seminar for 60 days after the event. Electronic materials are included with your registration.

Lawyers are often called upon to provide counsel on financial matters. Having a solid knowledge of financial principles and concepts is crucial for every well-rounded attorney. The more you understand, the better you are able to counsel clients with confidence or to use your financial understanding to their advantage during negotiation or litigation. Learn the basics of key financial concepts and strategies to help resolve your clients’ problems and meet their goals and objectives, including:

• The components of financial statements
• The basic equation of finance
• “Who’s who” in financial reporting
• Key numbers and ratios
• Business valuations
• Basic concepts of financial investment

Joseph Novello, CPA, MBA, began his career in accounting and management consulting at Ernst & Young in New York City. Mr. Novello’s wealth of experience was gained from working in both domestic and foreign Fortune 500 companies. His positions included Controller, CFO, Director of Planning and Analysis, and Director of Sales Operations. His goal is to present lawyers with an easy-to-understand seminar that will make dealing with a client’s financial matters more manageable.

50-Year and Active Pro Bono OSB members and Oregon judges and their lawyer staff – please call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413 to register for the seminars.

Need help with registration, refunds, tuition assistance or accessibility accommodations?
Call or email the OSB CLE Service Center:
(503) 431-6413 or (800) 452-8260, ext. 413 or cle@osbar.org

Please contact us at least 24 hours before the seminar for refunds and 72 hours before the seminar for accessibility accommodations.
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<th>Time</th>
<th>Session Title</th>
<th>Content</th>
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<td>9:00</td>
<td>Foundations of Modern Accounting and the Basic Equation of Finance</td>
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| 10:15 | Financial Statements | • Balanc sheet  
• Income and cash flow statements |
| 10:45 | Break |  |
| 11:00 | Financial Statements (continued) | • Notes to financial statements  
• Statement of equity and other comprehensive income  
• Management discussion and analysis  
• Auditor’s report  
• SOX certifications |
| 11:30 | Accounting Methodologies and Principles | • Accrual vs. cash basis  
• Other principles |
| 11:45 | Who’s Who in Financial Reporting | • Government and nongovernment regulators |
| 12:00 | Private Company Accounting | • Big company vs. small company GAAP  
• Role of finance in a company and related legal support  
• Private companies and the CPA  
• Alternative services—reviews and compilations |
| 12:15 | Lunch |  |
| 1:00  | Key Numbers and Ratios | • Earnings per share (EPS)  
• Price/earnings (PE) ratio  
• Revenue and earnings growth  
• Financial ratios—liquidity, solvency, and profitability |
| 1:30  | Present Value Concepts and Business Valuations | • Simple present value; value of annuities  
• Why do you need to value a business?  
• Business valuation methodologies  
• Resources geared toward lawyers |
| 2:30  | Break |  |
| 2:45  | The Lawyer’s Role in Financial Audits | • ABA and AICPA joint process |
| 3:45  | Basic Concepts of Financial Investment | • Risk vs. return  
• Modern portfolio theory and diversification |
| 4:00  | Financial Fraud Schemes |  |
| 4:15  | Adjourn |  |