



# FINANCE FOR LAWYERS

**WEDNESDAY, APRIL 11, 2018**  
**9:00 A.M. - 4:00 P.M.**

**5.3 hours CLE credit for  
Delaware and Pennsylvania attorneys**

**REGISTRATION AND CHECK-IN: 8:30 A.M. - 9:00 A.M. | CLE SEMINAR: 9:00 A.M. - 4:00 P.M.**

Live in New Castle County at Delaware State Bar Association, 405 N. King St., Suite 100, Wilmington, DE  
Live webcast in Kent County at Morris James LLP, 850 New Burton Rd., Suite 101, Dover, DE  
Live webcast in Sussex County at Tunnell & Raysor, 30 E. Pine St., Georgetown, DE

## PROGRAM HIGHLIGHTS:

- Foundations of Modern Accounting and the Basic Equation of Finance
- Financial Statements
- Accounting Methodologies and Principles
- Who's Who in Financial Reporting
- Private Company Accounting
- Key Numbers and Ratios
- Present Value Concepts and Business Valuations
- The Lawyer's Role in Financial Audits
- Basic Concepts of Financial Investment
- Financial Fraud Scheme

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Sponsored by the Delaware State Bar Association

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## PROGRAM SCHEDULE

### Presenter

Joe Novello, CPA, MBA  
*The Financial Training Organization*

Joseph Novello, CPA MBA, 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. His wealth of experience was gained from working in both domestic and foreign Fortune 500 companies as Controller, CFO, Director of Planning and Analysis, and Director of Sales Operations.

### Program

8:30 a.m. – 9:00 a.m.  
Registration/Check-in

9:00 a.m. – 9:15 a.m.  
**Foundations of Modern Accounting  
and the Basic Equation of Finance**

9:15 a.m. – 10:45 a.m.  
**Financial Statements**

- Balance sheets
- Income and cash flow statements

10:45 a.m. – 11:00 a.m. | Break

11:00 a.m. – 11:30 a.m.  
**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 a.m. – 11:45 a.m.  
**Accounting Methodologies and Principles**

- Accrual vs. cash basis
- Other principles

11:45 a.m. – 12:00 p.m.  
**Who's Who in Financial Reporting**

- Government and non-government regulators

12:00 p.m. – 12:15 p.m.  
**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 p.m. – 1:15 p.m.  
Lunch (on your own)

1:15 p.m. – 1:45 p.m.  
**Key Numbers and Ratios**

- Earnings per share (EPS)
- Price/earnings (PE) ratio
- Revenue and earnings growth
- Financial ratios – liquidity, solvency, profitability

1:45 p.m. – 2:45 p.m.  
**Present Value Concepts and Business Valuations**

- Simple present value
- Why do you need to value a business?
- Business valuation methodologies  
Resources geared toward lawyers

2:45 p.m. – 3:00 p.m.  
Break

3:00 p.m. – 3:30 p.m.  
**The Lawyer's Role in Financial Audits**

- ABA and AICPA joint process

3:30 p.m. – 3:45 p.m.  
**Basic Concepts of Financial Investment**

- Risk vs. return
- Modern portfolio theory and diversification

3:45 p.m. – 4:00 p.m.  
**Financial Fraud Schemes**

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## REGISTRATION FORM

### THREE WAYS TO REGISTER:

- NEW! Register online at [www.dsba.org/cle](http://www.dsba.org/cle). Log in and select Live Seminars (DSBA members only).
- Fax this completed form with credit card information to (302) 658-5212
- Mail this completed form with check or credit card information to:  
Delaware State Bar Association, 405 N. King St., Suite 100, Wilmington, DE 19801

**REGISTER ONLINE**

## Finance for Lawyers • Wednesday, April 11, 2018

Please return by Wednesday, April 4, 2018 • DSB04112018FINAN

### LOCATION:

- Delaware State Bar Association in Wilmington     Morris James in Dover     Tunnell & Raysor in Georgetown

### SELECT REGISTRATION TYPE:

All rates include the CLE Seminar and Material Download

- \$230.00 Members and Staff Registering Before 4/4/18     \$250.00 Members and Staff Registering On or After 4/4/18  
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### General Information

Return registration form to Delaware State Bar Association, 405 N. King St., Suite 100, Wilmington, Delaware 19801, or by fax to (302) 658-5212. A confirmation will be emailed to the registrant. Please keep a copy of this form as your receipt. CANCELLATION POLICY: A registrant may cancel a registration for a live seminar, but the cancellation and request for a refund must be made in writing and received no later than one week prior to a seminar to be approved. PA CLE Credit will be reported according to the PA CLE Board rules: [www.pacle.org](http://www.pacle.org). Unpaid registrants who fail to attend are responsible for the full cost of the live seminar. A registration for a live seminar may be transferred to another attorney. Call DSBA at (302) 658-5279 for more information. Visit [www.dsba.org](http://www.dsba.org) for all seminar policies.

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