

FINANCE FOR LAWYERS

6 CLE Hours

1 Professionalism Hour

ABOUT THE SEMINAR

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.

ABOUT THE SPEAKER

Joseph Novello's wealth of experience (CPA, MBA) was gained from working in both domestic and foreign Fortune 500 companies. Mr. Novello's goal is to present lawyers with an easy-to-understand seminar that will make dealing with a client's financial matters more manageable.

WHAT GEORGIA LAWYERS SAY

- *Mr. Novello did an excellent job.*
- *Joseph Novello was very engaging and interesting.*
- *Mr. Novello made an excellent and insightful presentation.*
- *I also really liked the case study he used... how he wove all the pieces together to see the bigger picture.*
- *This seminar gave a great overview for those who don't work much with finance.*

AGENDA

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| | PRESIDING: Joseph Novello , CPA, MBA, Program Chair, The Financial Training Organization, Metuchen, NJ | 11:25 | PRIVATE COMPANY ACCOUNTING |
| 7:30 | REGISTRATION AND CONTINENTAL BREAKFAST (All attendees must check in upon arrival. A jacket or sweater is recommended.) | | <ul style="list-style-type: none"> • 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 |
| 8:15 | WELCOME AND PROGRAM INTRODUCTION | 11:40 | LUNCH (Included In Registration Fee) |
| 8:30 | FOUNDATIONS OF MODERN ACCOUNTING AND THE BASIC EQUATION OF FINANCE | 12:05 | KEY NUMBERS AND RATIOS |
| 8:45 | FINANCIAL STATEMENTS | | <ul style="list-style-type: none"> • Earnings Per Share (EPS) • Price/Earnings (PE) Ratio • Revenue and Earnings Growth • Financial Ratios—Liquidity, Solvency, Profitability |
| | <ul style="list-style-type: none"> • Balance Sheets • Income and Cash Flow Statements • Notes to Financial Statements | 12:35 | PRESENT VALUE CONCEPTS AND BUSINESS VALUATIONS |
| 10:15 | BREAK | | <ul style="list-style-type: none"> • Simple Present Value; Value of Annuities • Why Do You Need to Value a Business? • Business Valuation Methodologies • Resources Geared Toward Lawyers |
| 10:25 | FINANCIAL STATEMENTS (Continued) | 1:35 | BREAK |
| | <ul style="list-style-type: none"> • Notes to Financial Statements (Cont.) • Statement of Equity and Other Comprehensive Income • Management Discussion and Analysis • Auditor's Report • SOX Certifications | 1:45 | THE LAWYER'S ROLE IN FINANCIAL AUDITS |
| 10:55 | ACCOUNTING METHODOLOGIES AND PRINCIPLES | | <ul style="list-style-type: none"> • ABA and AICPA Joint Process |
| | <ul style="list-style-type: none"> • Accrual vs. Cash Basis • Other Principles | 2:30 | BASIC CONCEPTS OF FINANCIAL INVESTMENT |
| 11:10 | WHO'S WHO IN FINANCIAL REPORTING | | <ul style="list-style-type: none"> • Risk vs. Return • Modern Portfolio Theory and Diversification |
| | <ul style="list-style-type: none"> • Government and Nongovernment Regulators | 2:45 | FINANCIAL FRAUD SCHEMES |
| | | 3:00 | ADJOURN |

LOCATION

STATE BAR OF GEORGIA HEADQUARTERS

104 Marietta Street NW • Atlanta, Georgia

For Directions Please Visit <http://www.gabar.org/>

To make hotel room reservations, call:

Embassy Suites phone: 1-800-Hiltons | The Glenn phone: 404-521-2250

Hilton Garden Inn phone: 404-577-2001 | The Omni phone: 404-818-4334 | Home2Suites Hilton phone: 404-965-7992

Ask for the State Bar of Georgia's negotiated corporate rate.

CANCELLATION POLICY

Cancellations reaching ICLE by 5:00 p.m. the day before the seminar date will receive a registration fee refund less a \$15.00 administrative fee. Otherwise, the registrant will be considered a "no show" and will not receive a registration fee refund. Program materials will be shipped after the program to every "no show." Designated substitutes may take the place of registrants unable to attend.

SEMINAR REGISTRATION POLICY

Early registrations must be received 48 hours before the seminar. ICLE will accept on-site registrations as space allows. However, potential attendees should call ICLE the day before the seminar to verify that space is available. All attendees must check in upon arrival and are requested to wear name tags at all times during the seminar. ICLE makes every effort to have enough program materials at the seminar for all attendees. When demand is high, program materials must be shipped to some attendees.

THREE WAYS TO REGISTER: check the ICLE schedule on the web at www.iclega.org

Mail: ICLE • P.O. Box 1885 • Athens, GA 30603-1885 (make check payable to ICLE)

Fax: 706-354-4190 (credit card payment must accompany fax to be processed)

Online: iclega.org (credit card payment only)

Duplicate registrations may result in multiple charges to your account. A \$15 administrative fee will apply to refunds required because of duplicate registrations.

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Questions? Call ICLE Atlanta Area: 770-466-0886 • Athens Area: 706-369-5664 • Toll Free: 1-800-422-0893

FINANCE FOR LAWYERS | MAY 4, 2017 | 9608

EARLY REGISTRATION: \$175

ON-SITE REGISTRATION: \$205

NAME _____ GEORGIA BAR # _____

FIRM/COMPANY _____ OFFICE PHONE _____

EMAIL _____

(To receive seminar notification and registration confirmation by email only.)

MAILING ADDRESS _____ ZIP + 4 _____

STREET ADDRESS _____ ZIP + 4 _____

CITY _____ STATE _____

- I am sight impaired under the ADA and I will contact ICLE immediately to make arrangements.
 I have enclosed a check in the amount of \$_____ (See fees at left)
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Credit Card Verification Number: A three-digit number usually located on the back of your credit card; *AmEx is four-digits on the front of the card.

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Expiration Date _____ Signature _____

- I am unable to attend. Please send ICLE program materials and bill me for the cost of materials only.

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