



STATE BAR
OF WISCONSIN

P.O. Box 7158, Madison, WI 53707-7158

Finance for Lawyers

Featuring Joseph Novello

Webcast Seminar:

Thursday, January 28, 2021

Friday, February 5, 2021

Wednesday, February 10, 2021

Monday, February 15, 2021

Thursday, February 25, 2021



STATE BAR OF WISCONSIN
PINNACLE

Finance for Lawyers

Featuring Joseph Novello



Back by popular demand!

7 CLE

Programs start January 28. Register today!

Finance for Lawyers

Featuring Joseph Novello

Boost your financial literacy

From bankruptcy and business transactions to divorce and personal injury, many legal situations have a financial component. If you suspect that having a better understanding of finance could amount to better results during transactions, negotiations, and litigation, then *Finance for Lawyers* can help strengthen your skillset as an attorney.



Joseph Novello, CPA, MBA, will use his wealth of experience in business and financial management to break down the complexities of financial data and explain key financial and accounting concepts. The first half of the program will feature encore excerpts from Joseph's popular 2019 Milwaukee presentation. He'll show you how to interpret financial transactions and communicate more effectively with business and financial colleagues. In the second half, Joseph will join remotely to explain key numbers and ratios, business valuation methodologies, basic concepts of financial investing like risk vs. return, and more!

Who should attend:

- Any attorney who needs a better understanding of financial transactions and accounting matters
- Bankruptcy, insolvency, and creditors' rights attorneys
- Estate planning and probate lawyers
- Real estate lawyers
- In-house counsel
- Business lawyers
- Personal injury lawyers
- Civil litigators
- Family lawyers
- General practitioners

How you'll benefit:

- Learn to identify and use financial and accounting information in a wide range of legal situations
- Gain an edge in negotiation or litigation with a greater understanding of financial matters
- Better help your clients meet their legal and financial goals

Register today!

Dates

Webcast Seminar

Thursday, January 28, 2021
Friday, February 5, 2021
Wednesday, February 10, 2021
Monday, February 15, 2021
Thursday, February 25, 2021

Note: The January 28, 2021 presentation will consist of a prerecorded morning session, and a live webcast afternoon session. All portions of this program for subsequent webcast dates will be prerecorded.

Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for up to **7 CLE credits**. It does not qualify for EPR credit.

Registration

Online: www.wisbar.org/seminars

Phone: (800) 728-7788

Fax: (608) 257-5502

Mail: State Bar PINNACLE Registrations

P.O. Box 7158

Madison, WI 53707-7158

State Bar CLE/PINNACLE Passbook Registrations: Passbook Certificates must be received by the State Bar at least one business day prior to the event.

Registration Cancellations: Please visit www.wisbar.org/cancellation_policy for information on PINNACLE registration cancellation policies.

Course materials for those attending the seminar: Course materials are provided in PDF format and are downloadable from myStateBar on wisbar.org up to two days prior to and 90 days after your seminar.

What past attendees say

"I thought the seminar covered a broad range of topics in a very interesting and easily explained way... I would recommend it to any lawyer who needs some background in finance and business evaluations who does not have the time to take an accounting or auditing course. Thank you for having Mr. Novello!"

"Excellent! Knowledge, experience, and expertise is more than evident. Fantastic ability to communicate 'foreign' concepts in simple, easy-to-understand terms. Great delivery, great presentation. Thank you."

MORNING SESSION
Presentation Filmed on November 22, 2019

8:30 AM Welcoming Remarks and Introduction

Foundations of Modern Accounting and the Basic Equation of Finance

Financial Statements

- Balance sheets
- Income and cash flow statements
- Notes to financial statements

15-Minute Morning Break

Financial Statements (continued)

- Statement of equity and other comprehensive income
- Management discussion and analysis
- Auditor's report
- SOX certifications

Financial Statements – Group Exercise

11:30 AM Lunch Break

Featured Presenter

Joseph Novello, CPA, MBA, began his career in accounting and management consulting at Ernst & Young, Certified Public Accountants, in New York City and obtained his Certified Public Accounting (CPA) license in New York. He earned a bachelor's degree from Brooklyn College and an MBA in finance from New York University.



His rich experience comes from working with American and International Fortune 500 companies as Controller, CFO, and in other positions. Since founding the Financial Training Organization in 2010, Joseph has presented his finance programs to hundreds of lawyers in 13 states and Canada.

AFTERNOON SESSION
January 28, 2021 Remote Presentation

12:30 PM Accounting Methodologies and Principles

- Accrual vs. cash basis
- Other principles

Who's Who in Financial Reporting

- Government and nongovernment regulators

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

Key Numbers and Ratios

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

Present Value Concepts and Business Valuations

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

15-Minute Afternoon Break

The Lawyer's Role in Financial Audits

- ABA and AICPA joint process

Basic Concepts of Financial Investment

- Risk vs. return
- Modern portfolio theory and diversification

Financial Fraud Schemes

4:05 PM Program Concludes

Following program start time, schedule will vary slightly from above listed times.



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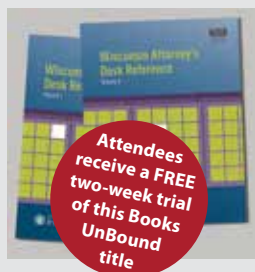
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Additional Learning Opportunities

Write Now: Effective Legal Writing 2020

Learn how to write more persuasively and to apply techniques of the legal-writing greats to polish your skills. Get tips that will immediately improve your writing and ways you can draft a brief that is actually enjoyable to read. **4 CLE**

Webcast Seminar: Dec. 22, 2020 | Dec. 30, 2020 | Jan. 7, 2021 | Jan. 15, 2021 | Jan. 19, 2021 | Jan. 23, 2021

Influence: The Art and Science of Changing Minds – Featuring Steve Hughes

Make convincing arguments without resorting to manipulation. Improve your persuasion with methods you can apply right away. Gain awareness of your persuasion weaknesses. Propose ideas or suggestions with more confidence. **3 CLE**

Webcast Seminar: Dec. 26, 2020 | Dec. 30, 2020 | Jan. 7, 2021 | Jan. 12, 2021 | Jan. 18, 2021 | Jan. 29, 2021

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Finance for Lawyers

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WEBCAST SEMINAR*

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☐ Lawyer State Bar Member No. _____

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