



STATE BAR
OF WISCONSIN

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



Finance for Lawyers Featuring Joseph Novello

- Live Webcast:** Thursday, January 25, 2024
- Webcast Replays:** Wednesday, January 31, 2024
Tuesday, February 6, 2024
Thursday, February 15, 2024
Friday, May 31, 2024
Tuesday, September 24, 2024



STATE BAR OF WISCONSIN
PINNACLE

Finance for Lawyers

Featuring Joseph Novello

Back by popular demand!



7 CLE

Programs start January 25. Register today!

Finance for Lawyers

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Back by popular demand!



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 skill set.

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. He'll show you how to interpret financial transactions and communicate more effectively with business and financial colleagues. You'll also explore key numbers and ratios, business valuation methodologies, basic concepts of financial investing like risk vs. return, and more!

How you'll benefit:

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

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

Register today!

Dates

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Thursday, January 25, 2024

Webcast Replays

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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: 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 wisbar.org/cancellations 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.

Be a star both in and out of the courtroom with the State Bar of Wisconsin PINNACLE National Presenter Series. Receive coaching from nationally recognized speakers with experience helping lawyers rise to the challenges of today's legal landscape.



Schedule

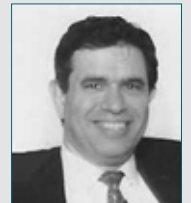
- 8:30 AM Welcoming Remarks and Introduction**
- 8:35 AM Foundations of Modern Accounting and the Basic Equation of Finance**
- 8:50 AM Financial Statements**
- Balance sheets
 - Income and cash flow statements
 - Notes to financial statements
- 9:50 AM Break**
- 10:05 AM Financial Statements (continued)**
- Statement of equity and other comprehensive income
 - Management discussion and analysis
 - Auditor's report
 - SOX certifications
- 11:05 AM Financial Statements – Group Exercise**
- 11:20 AM Accounting Methodologies and Principles**
- Accrual vs. cash basis
 - Other principles
- 11:35 AM Who's Who in Financial Reporting**
- Government and nongovernment regulators
- 11:50 AM Lunch Break**
- 12:50 PM 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
- 1:05 PM Key Numbers and Ratios**
- Earnings per share (EPS)
 - Price/earnings (PE) ratio
 - Revenue and earnings growth
 - Financial ratios—liquidity, solvency, and profitability
- 1:35 PM 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
- 2:35 PM Break**

- 2:50 PM The Lawyer's Role in Financial Audits**
- ABA and AICPA joint process
- 3:20 PM Basic Concepts of Financial Investment**
- Risk vs. return
 - Modern portfolio theory and diversification
- 3:50 PM Financial Fraud Schemes**
- 4:05 PM Program Concludes**

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

Featured Presenter

Joseph Novello, CPA, MBA, began his career in accounting and management consulting at Ernst & Young, Certified Public Accountant, 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 thousands of participants in 17 U.S. states and Canada.

What past attendees say about Joseph Novello

"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!"

"Really appreciate the variety of topics covered. Thanks for making a sometimes dry topic into an interesting presentation."

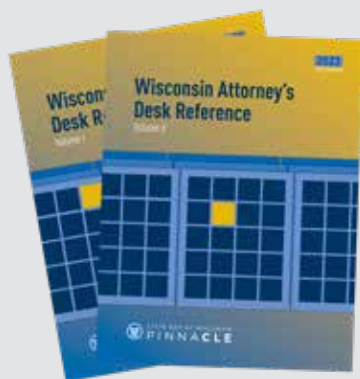
"Excellent! Knowledge, experience, and expertise is more than evident. Fantastic ability to communicate 'foreign' concepts in simple, easy-to-understand terms. Great delivery, great presentation. Thank you."

Book Bonus!

Wisconsin Attorney's Desk Reference

Seminar attendees **SAVE 15%** on *Wisconsin Attorney's Desk Reference** Think of it as an encyclopedia for lawyers, covering 35 topics in 11 practice areas.

*Attendees will receive information to access the discount via email after attending the program. Discount applies to both print and digital Books UnBound® editions of this title and cannot be applied to previous purchases. Offer valid as long as CLE credit is available for this program. For Books UnBound users, discount may be applied to purchase of individual Books UnBound title only and may not be used on purchase of full library.



Additional Learning Opportunities

Your Guide to the Corporate Transparency Act

Be prepared to advise your clients on Corporate Transparency Act (CTA) compliance with this seminar and companion PDF guide. You'll develop a better understanding of important definitions, covered entities, and reporting requirements of the CTA and receive materials to help you develop plans for current and future business clients. **3 CLE**

Webcast Seminar: Jan. 10, 2024 | Jan. 25, 2024

Reduce Your Risk: A Guide to Personal Safety and Security for the Legal Community

Reduce Your Risk is designed to help lawyers, judges, and other legal professionals better recognize the potential for threats and violent behavior and implement measures to prevent it. It empowers you to create an actionable safety plan based on real-world scenarios and expert recommendations.

Print Book: #AK0441; **Member:** \$29 | **Nonmember:** \$45

Business Law Forms Library

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Online subscription: # FSFB2000; **Members only:** \$105/year
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Finance for Lawyers

Priority Code: S 4 3 3 7 B

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<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$329
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$429
<input type="checkbox"/> Ultimate Pass Gold/Silver	<input type="checkbox"/> \$0
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Lawyer State Bar Member No. _____

Nonlawyer Profession _____

Name _____

Firm Name _____

Address _____

City/State/Zip _____

Phone Number _____

Email _____

PAYMENT: Tuition Amount Enclosed \$ _____

State Bar Passbook Certificate (enter certificate number) # _____

Check enclosed (payable to State Bar PINNACLE) _____

Ultimate Pass Gold Ultimate Pass Silver

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Event Code: CA3605 W R R2 R3 R4 R5