

### Clients tell us our credibility and reputation are unmatched.

Attorneys have trusted us again and again to deliver results when they need them the most.

Our specialty is doing a deep dive into the details to uncover what is truly there so we can deliver the most accurate financial conclusions. Having testified 100+ times, we are experienced at laying out the facts to present strong, compelling evidence in the courtroom.



#### Lost Profits Damages

We quantify business lost profits resulting from allegations of harm, such as claims for breach of contract.



#### Intellectual Property Damages

We quantify damages resulting from allegations of patent and trademark infringement, as well as claims of false advertising and interference with economic relations.



#### Lost Wages & Wrongful Death Damages

We calculate lost wages and benefits resulting from allegations of wrongful termination. We also determine economic loss resulting from wrongful death.



# Forensic Accounting & Fraud Investigation

We conduct accounting and fraud investigations involving allegations of financial malfeasance and employee embezzlement. Many of our business valuation projects include reconstruction of financial statements and identifying personal expenses.



#### Data Analytics

Many of our litigation projects include analysis of large, complex data sets. We employ data analytics skills to assist with development of the liability case and to quantify damages.



#### Business Valuation

We conduct business appraisals for litigation, estate planning, transactions and other purposes. We offer low scope calculations letters, as well as a more extensive option of a full appraisal report, and we review other experts' valuation reports.



# **Continuing Legal Education (CLE) Programs**

By our financial experts who tell a powerful story with numbers





#### **Fundamentals of a Lost Profit Calculation**

- Types of financial experts and categories of expert opinions
- The four parts of a lost profits analysis:
  - 1. Lost Revenues
  - 2. Avoided Costs
  - 3. Extraordinary Out-of-Pocket Costs
  - 4. Interest



#### **Nuts and Bolts of Business Valuation**

- Process: defining the engagement and gathering information
- Applying three valuation approaches: income, market, asset
- Considering discounts
- Allocating value



# **Credible Expert Testimony - How do we get there?**

Best Practices for Working with Damage & Valuation Experts
This as a collaborative presentation where we ask senior litigators to answer
our questions as a learning opportunity for junior attorneys.

- At the beginning Does this case need an expert?
- Which expert do I choose?
- Should I work collaboratively with the expert, or not?
- What defines a superior expert report?
- Going live What are the qualities of great testimony?



# **Secret Weapons of Litigation from a Financial Expert's Perspective**

- Technology: Valid8 example
- Ratio Analysis: Basic ratios & M-Score example
- Data Analytics: From data to visualization
- Color Themes: Distinguishing between opinions
- Less is More: Our federal report writing approach

# Meet the Experts

## Our team brings a mighty combination of financial expertise.

We're a highly skilled team of independent CPAs and experts who answer the toughest financial questions and perform under pressure. With a background working at top global accounting firms, in-house with major corporations and as business owners, we apply decades of specialized experience and diverse talents to each case.



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