January 11-12, 2018
FT. LAUDERDALE
AND ONLINE SIMULCAST

FIRST TIME ATTENDEES $100 OFF PROMO CODE NEWLC18
YOUNG CPAS $150 OFF PROMO CODE YCPALC18
Welcome to the 2018 FICPA Valuation, Forensic Accounting & Litigation Services Conference! Our veteran planning committee has done a fantastic job bringing together cutting edge topics and outstanding speakers to offer you 16 hours of the best CPE in the field.

This long-standing, elite conference keeps you connected with your peers, and provides novice and seasoned CPAs alike with the information and tools needed to keep on top of the profession. This year’s agenda explores timely topics including insurance challenges raised by the very active hurricane season, advances in cyber security, along with in-depth review of malpractices issues and family case law. We are also pleased to announce that this year our conference will be available to all CPAs across the state and beyond via simulcast.

Now that we've piqued your interest, we hope you will take a moment to review the complete agenda and reserve your seat at the 2018 VFALS conference. Start the year off right! See you in Fort Lauderdale January 11-12, 2018.

CPE Credit:
This conference qualifies for up to 16 hours of CPE credit and is subject to change. CPE credit is subject to approval by the Florida Department of Business and Professional Regulation. Application has been made for 16 hours of CLE. You must apply directly to the Florida Bar.

Follow the FICPA on Twitter @ficpa and use #ficpaLC to tweet about this conference.
Thursday, January 11, 2018

7:30am-8:00am  Registration & Continental Breakfast
8:00am-8:10am  Introduction and Opening Remarks
8:10am-9:00am  Economic Development Update
9:00am-9:50am  Malpractice Cases — Plaintiff Perspective
9:50am-10:10am Break
10:10am-11:00am Confessions of a Reluctant Expert Witness
11:00am-11:50am Dale Carnegie Techniques: Foundation for Success
11:50am-12:50pm Lunch
12:50pm-1:40pm  Breakout 1: Is the Size Effect Alive and Kicking...or Dead as a Doornail?
1:45pm-2:35pm  Breakout 2: Why PI? The CPA as Private Investigator
2:40pm-3:30pm  Breakout 3: Hot Topics in Business Valuation
2:40pm-3:30pm  Breakout 4: Insurance Implications of Hurricanes
3:30pm-3:45pm  Breakout 5: Valuation of International Entities
3:30pm-3:45pm  Breakout 6: Accounting in a Digital Universe
3:45pm-4:35pm  Breakout 7: Is the Size Effect Alive and Kicking...or Dead as a Doornail?
4:35pm-5:25pm  Cyber Security — Current Threats and Intrusions

Friday, January 12, 2018

7:30am-8:00am  Continental Breakfast
8:10am-9:00am  Services to Businesses Involved in Marijuana
9:00am-9:50am  Malpractice — Best Practices Case Studies
9:50am-10:10am Break
10:10am-11:00am Breakout 7: Appraisals: the Differences When Using Them in Estate, Family Law and Litigation
11:05am-11:55am Breakout 8: A Case Study in Family Law: Living in the Gray Zone Part 1
11:05am-11:55am Breakout 9: Enhancing Consistency and Transparency in the Fair Value Measurement Process
11:55am-1:00pm Lunch
1:00pm-1:50pm  Breakout 10: A Case Study in Family Law: Living in the Gray Zone Part 2
1:00pm-1:50pm  Breakout 11: Valuation Case Law Update — A Change is Gonna Come
2:05pm-3:45pm  Breakout 12: Family Case Law Update
2:05pm-3:45pm  Panel Discussion: At the Bench with the Judges
7:30am-8:00am  Registration & Continental Breakfast

8:00am-8:10am  Introduction and Opening Remarks

8:10am-9:00am  Economic Development Update: Working Together to Support Growth and Prosperity (Credits: 1.0 TB)

*Michael Finney, President & CEO*
Miami Dade Beacon Council | Miami, FL

Economic development organizations depend on accounting and other professionals to do their job effectively and efficiently. Learn how you can add value to your clients while helping to grow jobs and investment in our communities.

9:00am-9:50am  Malpractice Cases — Plaintiff Perspective (Credits: 1.0 TB)

*Presenter: TBD*

Please check the FICPA website for session updates.

9:50am-10:10am  Break

10:10am-11:00am  Confessions of a Reluctant Expert Witness (Credits: 1.0 TB)

*Z Christopher Mercer, FASA, CFA, ABAR, CEO*
Mercer Capital Management, Inc | Memphis, TN

Becoming an expert witness isn’t easy. Learn first-hand from an expert about mistakes made and how to avoid them. Explore how to prepare for and conduct yourself in depositions; how to be an effective witness on the stand; and how to organize an expert witness project — from acceptance to final billing. Learn how to testify as an expert witness with impact.

11:00am-11:50am  Dale Carnegie Techniques: Foundation for Success (Credits: 1.0 BE)

*Christine Ramirez Pallesen, Partner and Vice President*
Dale Carnegie Training | Southeast Florida

Based on the time-tested Dale Carnegie principles of Winning Friends and Influencing People, this energizing and interactive session begins with taking total ownership of ourselves and how we are perceived. By session’s end, you will have techniques to strengthen relationships internally and externally; be able to apply attitude control principles to manage stress levels; and incorporate Dale Carnegie’s famous principles to stand out in your professional field.
11:50am-12:50pm  Lunch

12:50pm-1:40pm  (Concurrent Breakouts — Choose One)

Breakout 1  Is the Size Effect Alive and Kicking...or Dead as a Doornail?  (Credits: 1.0 TB)
Jim Harrington, Director
Office of Professional Practice, Duff & Phelps LLC | Chicago, IL
The rumors of the Size Effect’s death in more recent years may be overblown. Review the evidence, let the chips fall where they may, and you decide.

Breakout 2  Why PI? The CPA as Private Investigator (Credits: 1.0 TB)
Bruce Yasukochi, CPA, PI, CFE, CFF, CITP, Director
Forensic and Litigation Services, Cherry Bekaert LLP | Ft Lauderdale, FL
Learn the legal and professional requirements for obtaining a private investigator’s license in the State of Florida, and explore issues specific to “white collar” criminal investigations. Understand the differences between the “practice of accounting” under the CPA rules and a “private investigation” under the PI rules. Gain insights into the preparation of case matters for possible criminal prosecution.

1:45pm-2:35pm  (Concurrent Breakouts — Choose One)

Breakout 3  Hot Topics in Business Valuation (Credits: 1.0 TB)
James R. Hitchner, CPA/ABV/CFF, ASA, Managing Director
Financial Valuation Advisors, Inc | Ventnor City, NJ
Join us for the latest on S Corp models: Treharne, SEAM, Delaware MRI and Fannon; Discounts and premiums: what works and what doesn’t; Cost of capital: best practices; BV standards: how to use them in litigation; and DCF and CCF: best practices.

Breakout 4  Insurance Implications of Hurricanes — Lessons Learned and Tips for the Future (Credits: 1.0 TB)
Walter Andrews, Partner
Hunton & Williams, LLP | Miami, FL
Learn the insurance implications of this very active recent hurricane season and how to maximize the recovery of insurance for hurricane business interruption losses. Explore how CPAs can help achieve that recovery notwithstanding hurdles that may be erected by insurance companies.
2:40pm-3:30pm (Concurrent Breakouts — Choose One)

Breakout 5  
**Valuation of International Entities (Credits: 1.0 TB)**
Gustavo A. Perez, ASA, MBA, National Leader, Valuation Services  
Cherry Bekaert LLP | Ft Lauderdale, FL

This session provides an overview of the challenges valuing international entities, including international cost of capital, country risk premium, risks associated with an international investment, currency issues and other relevant aspects through real-life examples and illustrations.

Breakout 6  
**Accounting in a Digital Universe (Credits: 1.0 TB)**
Dan Regard, CEO  
IDiscovery Solutions, Inc. | Washington, DC

The world is going digital. This has disrupted multiple industry sectors. How will that affect accounting in business valuations, forensic accounting, asset tracking and elsewhere? Join us for a TED-talk style presentation of a vision of the future of accounting - tapping into the digital universe.

3:30pm-3:45pm Break

3:45pm-4:35pm  
**Valuation of Cryptocurrency Assets (Credits: 1.0 TB)**
Andrew Hinkes, Partner  
Berger Singerman LLP | Miami, FL

Bitcoin and other cryptocurrencies have gained popularity as investment products and as a fundraising tool for fledgling businesses worldwide. Explore the fundamentals of how cryptocurrencies work, how and why they have market value, and learn concepts of how to value these assets.

4:35pm-5:25pm  
**Cyber Security - Current Threats and Intrusions (Credits: 1.0 TB)**
Michael D’Alanzo, Assistant Special Agent in Charge  
United States Department of Justice | Miramar, FL

This session will provide an overview of today’s threats and how to prepare yourself and your employees to combat the threat.

5:25pm-6:00pm  
Reception
7:30am-8:00am Continental Breakfast

8:10am-9:00am Services to Businesses Involved in Marijuana (Credits: 1.0 TB)
Rachel Gillette, Shareholder
Greenspoon Marder | Denver, CO

The marijuana industry is new and burgeoning business that requires a unique approach to accounting and taxation. In this session, we will explain the legislative history; the IRS audit and taxation environment; pitfalls in overly complicated structuring; as well as provide some tools that shift the financial reporting function from a standard approach to one that facilitates budgeting day-to-day operations and tax implications.

9:00am-9:50am Malpractice — Best Practices Case Studies (Credits: 1.0 TB)
Presenter: TBD
Please check the FICPA website for session updates.

9:50am-10:10am Break

10:10am-11:00am (Concurrent Breakouts — Choose One)

Breakout 7 Appraisals: the Differences When Using Them in Estate, Family Law and Litigation (Credits: 1.0 TB)
Andrew Kravit, President
Kravit Estate Appraisals | Boca Raton, FL

Learn all about appraisals — the benefits of having an appraisal completed and examples of cases appraisals that were conducted and not conducted.

Breakout 8 A Case Study in Family Law: Living in the Gray Zone Part 1 (Credits: 1.0 TB)
Sandra L. Perez, CPA/ABV/CFF, CFE, Director
Family Law Forensic Services, Berkowitz Pollack Brant Advisors and Accountants, LLP | Ft Lauderdale, FL
and Jodi Furr Colton, Partner
Brinkley Morgan Attorneys at Law | Boca Raton, FL

Hear from seasoned family law professionals during this two-part session on how to tackle frequent questions found in the family law cases that don’t always have black and white answers such as “How are non-martial assets excluded?”, “How is alimony determined when income fluctuates?”, “What does ‘status quo’ really mean?” and more.
11:05am-11:55am  (Concurrent Breakouts — Choose One)

Breakout 9  Enhancing Consistency and Transparency in the Fair Value Measurement Process (Credits: 1.0 TB)
Kellie Adkins, Managing Director
Crowe Horwath, LLP | Dallas, TX
Explore the Mandatory Performance Framework (a non-authoritative framework) that goes over the “how much is necessary” for a supportable/auditable analysis/report. Discuss how this is expected to enhance consistency and transparency in the fair value measurement process.

Breakout 10  A Case Study in Family Law: Living in the Gray Zone Part 2 (Credits: 1.0 TB)
Sandra L. Perez, CPA/ABV/CFF, CFE, Director
Family Law Forensic Services, Berkowitz Pollack Brant Advisors and Accountants, LLP | Ft Lauderdale, FL
and Jodi Furr Colton, Partner
Brinkley Morgan Attorneys at Law | Boca Raton, FL
Learn how to tackle frequent questions found in family law cases. (See breakout 8 for complete description.)

11:55am-1:00pm  Lunch

1:00pm-1:50pm  (Concurrent Breakouts — Choose One)

Breakout 11  Valuation Case Law Update — A Change is Gonna Come (Credits: 1.0 TB)
Kevin R. Yeanoplos, CPA, ABV, CFF, ASA, Director of Valuation Services
Brueggeman and Johnson Yeanoplos, PC | Tucson, AZ
Charles Darwin wasn’t accredited in business valuation, but he could have learned a thing or two about evolution by studying the valuation profession. As evidenced by this discussion of relevant case law, the only constant is change. You’ll want to attend this informative analysis of the most important recent valuation cases.

Breakout 12  Family Case Law Update (Credits: 1.0 TB)
Cynthia L. Greene, Esq., Partner
Greene Smith & Associates, PA | Miami, FL
Review of 2017 caselaw update with a focus on financial issues in the caselaw.

2:05pm-3:45pm  At the Bench with the Judges (Credits: 2.0 TB)
An esteemed panel of judges will discuss the importance of expert testimony in the outcome of trials and share examples of trials where expert testimony was demonstrably critical to the outcome.
VALUATION, FORENSIC ACCOUNTING AND LITIGATION SERVICES CONFERENCE COMMITTEE

Monte E. Kane — Chair
Steven A. Wolf — Vice-Chair

Mirtha G. Aguirre
Herbert Becker
Curtis H. Bernstein
Marcie D. Bour
John M. Byrne
Lillian M. Conrad
Paul Dumm
Charles Felix
Kelsey A. Griffin
Tarsha R. Jacobs
Michael S. Kridel
Veronica Larriva
Harold D. McFarland
Natasha Novikov

Henry J. Jr Patton
Sandra L. Perez
Richard A. Pollack
Amanda M. Porupski
Charles C. Price
Arlene Ravalo-Jao
Michael J. Reed
Kenneth Rosa
James H. Rosenberg
Anthony D. Samons
Sheri F. Schultz
Poonam N. Vaidya
Caridad Vasallo
J V. Williams
Conference Site & Accommodations

Marriott — Fort Lauderdale North
6650 North Andrews Avenue, Ft Lauderdale, FL 33309
800-228-9290

FICPA Room Rate: $169.00 Single/Double

Hotel Cutoff Deadline: Friday, December 15, 2017
(Reservations made after the cutoff date will be subject to availability and current room rate.)

For reservations, please contact Marriott reservations at 800-228-9290. Be sure to mention the FICPA Valuation, Forensic Accounting and Litigation Services Conference to receive the special group rate.

First Time Attendees

*NEWLC18 promo code offer valid for first-time attendees, applies to in-person registration and does not apply to non-member fees. Discount cannot be combined with other offers or applied to prior purchases/registrations.

Young CPAs

*YCPALC18 promo offer valid for young CPAs, applies to in-person registration and does not apply to non-member fees. Discount cannot be combined with other offers or applied to prior purchases/registrations.

CPE Policies You May Need to Know

CPE policies may be found on our Web site at www.ficpa.org/policies, or on the registration confirmation sent upon completion of registration.

Group Discounts Available

Register 5 or more people from the same organization and receive special group discounts! Restrictions may apply. For more information, visit www.ficpa.org/policies.

Did you know…

You can apply your nonmember fee from this event towards an FICPA membership. Visit www.ficpa.org/policies for more details and an application.

Can’t Attend in Person?

If you can’t make it to the Valuation, Forensic Accounting and Litigation Services Conference we’ll have select sessions available through live webcast! You can register to watch the two days or just one. To register for the webcast and more information, please visit: http://www.ficpa.org/content/CPE/Events/Conferences.aspx
**REGISTRATION**

**Four ways to register for FICPA CPE Programs**

- **Internet registration** can be placed at www.ficpa.org/cpe.
- **Call** the FICPA Member Service Center at (800) 342-3197, or (850) 224-2727 to place a credit card order.
- **Fax** a completed registration form to the FICPA at (850) 681-2433.
- **Mail** a completed registration form to: FICPA, Continuing Professional Education, P.O. Box 5437, Tallahassee, FL 32314-5437.

**Contact Information**

Name ______________________________________ FICPA Member No. ______________________

Firm ____________________________________________________________________________

Address __________________________________________ City/State/ZIP _________________

Telephone (______) __________________ Email _______________________________________

☐ Check here if registration reflects an address change.

☐ Check the following box(s) to receive membership information for:

☐ Florida CPA/PAC
☐ FICPA Scholarship Foundation

☐ In accordance with ADA requirements, if you are disabled and require special services, please check here. Someone from our office will contact you.

**Registration Prices**

<table>
<thead>
<tr>
<th>Description</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Early Bird Price</td>
<td>$460</td>
</tr>
<tr>
<td>Regular Price <em>(As of 12/12/2017)</em></td>
<td>$515</td>
</tr>
<tr>
<td>Nonmember Early Bird Price</td>
<td>$710</td>
</tr>
<tr>
<td>Nonmember Regular Price <em>(As of 12/12/2017)</em></td>
<td>$765</td>
</tr>
<tr>
<td>Simulcast Early Bird Price</td>
<td>$485</td>
</tr>
<tr>
<td>Simulcast Regular Price <em>(As of 1/11/2018)</em></td>
<td>$485</td>
</tr>
<tr>
<td>Simulcast Nonmember Early Bird Price</td>
<td>$725</td>
</tr>
<tr>
<td>Simulcast Nonmember Regular Price <em>(As of 1/21/2018)</em></td>
<td>$725</td>
</tr>
</tbody>
</table>

**Subtotal** $______________

**Total** $______________

You will be automatically registered for all General Sessions. Please check one breakout session for each time slot indicating the concurrent session you wish to attend.

**Thursday, January 11, 2018**

- 12:50pm-1:40pm ☐ BO1 ☐ BO2
- 1:45pm-2:35pm ☐ BO3 ☐ BO4
- 2:40pm-3:30pm ☐ BO5 ☐ BO6

**Friday, January 12, 2018**

- 10:10am-11:00am ☐ BO7 ☐ BO8
- 11:05am-11:55am ☐ BO9 ☐ BO10
- 1:00pm-1:50pm ☐ BO11 ☐ BO12

**Method of Payment**

☐ Check enclosed in the amount of $___________ made payable to the FICPA and mailed to: FICPA, Continuing Professional Education, P.O. Box 5437, Tallahassee, FL 32314-5437.

To pay with a credit card, please go online at www.ficpa.org/Content/CPE/Events/Conferences.aspx and click **Valuation, Forensic Accounting and Litigation Services Conference**, then click the “Register” button or call the FICPA Member Services Center at (800) 342-3197 or (850) 224-2727.
REGISTER NOW!
Get the early bird rates before December 12.

Florida Institute of Certified Public Accountants
P.O. Box 5437 • Tallahassee, Florida 32314
www.ficpa.org/cpe • (800) 342-3197 • (850) 224-2727

VALUATION, FORENSIC ACCOUNTING & LITIGATION SERVICES CONFERENCE
JANUARY 11-12, 2018
FT. LAUDERDALE MARRIOTT NORTH