



NACVA AND THE IBA'S 2010 ANNUAL CONSULTANTS' CONFERENCE *SESSION SUMMARY*
JUNE 2—5, 2010 THE FONTAINEBLEAU MIAMI BEACH MIAMI BEACH, FL USA

Track: Matrimonial Litigation

Session Date / Time: Thursday, June 3, 2010 / 10:15am – 11:55am

Session Title: *How Small Firms Can Balance Engagement Risk and Client Expectations While Having Adequate Resources*

Session Summary: This session is intended to be an interactive session where practitioners in smaller firms can discuss issues they face particularly as it relates to balancing engagement risk with client expectations. We will discuss how practitioners are able to provide clients with cost effective services while meeting all of the applicable standards. Other topics will be how to maintain an adequate library of resources and how to find and keep employees. No subject is off limits here.

CPE Hours / Fields of Study: Two (2) hours / Business Management & Organization (BM&O)

Presenter Bio:



Karen Kaseno, CPA/ABV/CFF, CVA, CFE, CFFA, is an alumni of Deloitte Haskins + Sells and has been practicing in the area of litigation services since 1989. Ms. Kaseno's practice specializes in family law, business valuations, economic damage cases and fraud investigations. She has been appointed by the family law court as an Evidence Code §730 Special Master on hundreds of occasions.

Her family law practice involves engagements relating to business valuations, analysis of income available for support, apportionment of separate and community property, complex calculations in high net worth cases, and tracings of separate and community property.

Ms. Kaseno has also conducted several forensic investigations on fraud-related matters for both criminal and civil matters. She has been named as an expert witness on hundreds of commercial litigation matters involving loss of earnings on a variety of legal matters.

Over the past two decades, Ms. Kaseno has been extremely active in developing and teaching within the accounting and legal professions. Ms. Kaseno has developed and taught over a half dozen courses covering many aspects of forensic accounting including the ***Fraudsafe™ Fraud Prevention and Investigation Five Day Training Program for CPAs.*** Ms. Kaseno is a founding

member and instructor in NACVA's National Matrimonial Litigation Workshop. Ms. Kaseno has been a presenter at conferences and continuing education programs throughout the United States for both CPAs and attorneys covering topics including numerous issues in family law litigation, business valuation, fraud investigations, and providing expert witness testimony. Her presentations have also been made directly to judges.

She is also the former Chair of the Fraud Section of the litigation services committee of California. Ms. Kaseno has chaired and been on the planning committees for numerous conferences for the California Society of Certified Public Accountants Education Foundation, American Institute of Certified Public Accountants, and the National Association of Certified Valuation Analysts. Ms. Kaseno received the Outstanding Member award from NACVA in 2007.

Presenter Bio:



Ron Seigneur, MBA, CPA/ABV, CVA, CFF, has over 25 years of valuation experience and has been endorsed as an expert witness in several jurisdictions and has served in appointments such as trustee, mediator, arbitrator and special master of the court. Ron is very active nationally as an educator and author of valuation science and has written and taught advanced level valuation courses in several states for the AICPA, NACVA state bar associations and the Environmental Protection Agency. He is past chair of the AICPA Accredited in Business Valuation committee and NACVA's Professional Standards Board. He is an adjunct professor at the University of Denver College of Law where he teaches leadership and management for law firms. Ron is an author and lead instructor of the Association of Legal Administrator's national Essential Competencies training program for financial management. Ron holds a BA in Hotel Restaurant and Institutional Management from Michigan State University and an MBA in Accounting and Corporate Policy from the University of Michigan. Ron also continues to focus attention to tax planning and compliance matters, as well as emphasizing succession and exit planning strategies for Seigneur Gustafson clients and their professional advisors

Presenter Bio:



Stacey Udell, CPA/ABV/CFF, ASA, CVA, is a partner in Gold Gocial Gerstein LLC, a full service certified public accounting firm, with three offices located in New Jersey and Pennsylvania. She specializes in business valuation, litigation support, forensic accounting, accounting and tax services. Ms. Udell is a member of American Institute of Certified Pubic Accountants (AICPA), National Association of Certified Valuation Analysts (NACVA), American Society of Appraisers (ASA), and New Jersey Society of Certified Public Accountants (NJSCPA). She currently serves on the Litigation Forensics Board of NACVA and the Executive Board of the New Jersey State NACVA Chapter. She has been a member of the planning committees for both local and national NACVA conferences. In addition to presenting on topics related to business valuation and litigation support, Ms. Udell has been published in the American Journal of Family Law, is on the Panel of Experts for the Financial Valuation and Litigation Expert, and is a contributing author to the Business Valuation Resources Guide to Healthcare Valuation and to the soon to be published Family Law Services Handbook.