

Sponsored by Buxmont Chapter PSTAP

Understanding Blockchain, The Accountant as an Expert Witness, and Compilation, Review & Preparations Update—Surgent Friday, September 20, 2024

Radisson Hotel Philadelphia Northeast
 2400 Old Lincoln Highway
 Trevose, PA 19053
 (1/4 mile South of PA Turnpike Interchange 351)
 Hotel Phone: (215) 638-8300

Registration: 7:00 am
Seminar: 8:00 a.m.–4:30 p.m.
CPE: 8 Hours A&A
Speaker: Thomas Newell, Jr., CPA

☞ **Early Bird Member's Only Special (on or before Aug. 30, 2024) In-Person or Webinar: PSTAP Member: \$260**
 ☞ **Regular Rate (on or after Aug. 31, 2024) In Person or Webinar: PSTAP Member: \$300 Non-Member: \$340**

- Please note, The course material will only be provided digitally; no paper copies will be distributed.
- Registration fee includes digital seminar workbook. In-person only: includes continental breakfast, lunch & refreshment breaks.
- **REGISTER Online www.pstapcpe.com or Mail check payable to Buxmont Chapter PSTAP, Attn: Seminar Registrations, 150 Corporate Center Dr., Ste. 205, Camp Hill, PA 17011 or FAX to 717-614-8663**
- Seminar Confirmations—Sent upon registration, via email only—please provide your email address below
- Questions??? Contact PSTAP Executive Office at 1-800-270-3352 or by email at info@pstap.org
- Refund Policy: For detailed cancellation policy please visit www.pstap.org

Registration Form: (one form per registration—photocopy for additional registrants) **REGISTRATION DEADLINE: 9/13/2024**

First Name _____ MI _____ Last _____ PSTAP ID #: _____

Firm: _____ Phone: (_____) _____

Street Address _____ City _____ State _____ Zip _____

Email Address _____ License Number—CPA/PA—Required _____

- Meal Choices—Please Choose One:**
- Grilled Chicken and Penne Pasta Primavera
 - Pan Seared Salmon, Lemon Caper Sauce
 - Vegetarian—Stuffed Roasted Garlic Portobello mushrooms w/rice & Veg
 - None

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I will attend in-person I will attend virtually via the webinar

Check in the amount of: \$ _____ Enclosed—Payable to Buxmont Chapter PSTAP—Mailed to the above address

VISA/MC/Amex Acct # _____ Exp: _____ CVV: _____

Signature: _____

Send me an application to join PSTAP—Join prior to seminar and pay the member rate!

Surgent Understanding Blockchain, The Accountant as an Expert Witness, and Compilation, Review & Preparations Update—Surgent

This 8-hour day includes three segments: Understanding Blockchain, Bitcoin, and Digital Assets, and Their Accounting Intricacies; The Accountant as the Expert Witness; and Guide and Update to Compilations, Reviews, and Preparations.

Major Topics:

- Cryptocurrencies, including Bitcoin, crypto assets, and other digital assets
- Blockchain
- NFT accounting
- Becoming qualified as an expert witness
- Best practices for testifying at trial
- Understanding the different roles accountants can play in litigation
- Working with attorneys to prepare and present a case at trial
- The role of experts in commercial versus personal injury litigation
- Confidentiality orders
- Compensation for expert witnesses
- Preparing for and attending depositions
- Daubert challenges to experts
- Expert reports
- The role of experts in antitrust, securities litigation, and professional liability cases
- Credibility as a witness
- FASB ASC 350 – Intangibles – Goodwill and other
- SSARS No. 21, *Clarification and Recodification*, and updates to SSARS No. 21 due to the issuance of SSARS No. 23, *Omnibus Statement on Standards for Accounting and Review Services*
- SSARS No. 22, *Compilation of Pro Forma Financial Information*
- SSARS No. 24, *Omnibus Statement on Standards for Accounting and Review Services -- 2018*
- SSARS No. 25, *Materiality in a Review of Financial Statements and Adverse Conclusions*
Sample comprehensive engagement work programs for preparation, compilation, and review engagements

Learning Objectives:

- Understand the fundamentals of blockchains and digital assets, including cryptocurrencies
- Identify the relevant U.S. GAAP guidance for measuring, recognizing, and reporting cryptocurrencies and other digital assets
- Describe the relation between cryptocurrencies and blockchain
- Understand how to become qualified as an expert witness
- Learn skills that experts use during deposition and trial to support their conclusions
- Understand the litigation process and the role accountants play in moving a case forward through to trial
- Understand and apply SSARS No. 21, *Clarification and Recodification*
- Be familiar with changes related to the issuance of SSARS Nos. 22-25
- Be familiar with preparation, compilation, and review program examples
Be aware of the most recent reports and other required communications

Designed For: CPE Credits: 5 Auditing, 3 Accounting, **Level:** Basic/Update, **Prerequisite:** Experience in performing and managing compilation, preparation, and review engagements

Speaker Bio: Thomas E. Newell, Jr. (Tom) is a shareholder in the firm of Newell & Newell, P.C.,

Tom has been a presenter at conferences and CPE courses for over 30 years. He has been a frequent presenter for the Georgia Society of CPAs at the Southeastern Accounting Show, Tax Forum (A&A topics), and the Accounting Institute. Tom is also a discussion leader for various continuing education courses on A&A topics for other state societies. He has made presentations at Fortune 500 companies and several government agencies on accounting and auditing, internal controls, and cybersecurity. As a presenter, Tom has been described as a dynamic speaker who is able to take a boring topic (accounting and auditing) and make it interesting. His skills resulted in his being awarded the Surgent Outstanding Discussion Leader Award in 2015, 2016, and 2018.