

*This webinar is based on a presentation given at the September 30, 2014 Montreal Workshop.  
Due to popular demand, it is now being offered as a webinar.*

## **“EVOLUTION OF BEST PRACTICES FOR EXPERT WITNESSES: *Moore v. Getahun* decision — communications with counsel and use of draft reports**

**Wednesday January 14, 2015  
12:00 PM – 1:30 PM**

### **Presentation Overview**

This webinar provides an overview of recent developments affecting CBVs involved in litigation support and a refresher on the legal and regulatory contexts shaping our profession.

The recent Ontario Superior Court of Justice decision in *Moore v. Getahun* (2014 ONSC 237) has brought to the forefront the issue of communications between legal counsel and independent experts, particularly with respect to report drafting and preparation for testimony at trial. Richard Wise and Catherine Tremblay will discuss potential issues raised by this case, even as it is being appealed and the CICBV has filed a Factum as an Intervenor in the Appeal, for which submissions have also been made by the Advocates’ Society and other associations of lawyers.

They will also provide an overview of rules applicable to expert evidence in Ontario and examine recent guidance relating to the use of draft reports in Canada as well as proposed changes in the United States with respect to the retention of draft reports in litigation matters.

*The views expressed in this webinar are those of the presenters and not the CICBV.*

### **Presenters**

**Richard M. Wise, FCPA, FCA, FCBV, FASA, FRICS, MCBA, CVA, CA•IFA, CFF, C.Arb  
&  
Catherine Tremblay, CPA, CA, CBV, ASA, CFF**  
**Partners, Valuation & Litigation Support — Montréal**  
**MNP LLP**

**Richard Wise**, a Management graduate of McGill, is a Past President of The Canadian Institute of Chartered Business Valuators, former member of Council of the Order of Chartered Professional Accountants of Quebec, a Fellow of the Institute of CAs of Ontario, former Governor of the American Society of Appraisers. He serves on the ASA Business Valuation Committee and is Chair of the Standards Committee.

Richard was a lecturer in Valuation at the Law Society of Upper Canada and is co-author of *Guide to Canadian Business Valuations* (Carswell), with Dr. Shannon Pratt. A former Special Assistant to the Minister of National Revenue in Ottawa, Richard has acted as valuation expert for Justice Canada, the CRA, Revenu Québec, the Competition Bureau, Attorney General of Ontario, Public Trustee of Ontario and the Québec Financial Markets Authority. He has given expert evidence in

over 200 cases across Canada and in the U.S., including the Tax Courts in both countries, and has been appointed by judges and arbitrators as their valuation expert.

Richard has given more than 200 conference presentations across Canada and the U.S., including annual conferences of the CICA, Canadian Bar Association, American Bar Association, the ADR Institute, Canadian Tax Foundation, CICBV and the ASA. He has published numerous valuation articles and chapters in both countries.

**Catherine Tremblay**, is a partner and National Leader of Valuations at MNP LLP. She provides business valuation and litigation support services to public and private companies operating in various industries, as well as to governmental authorities.

Catherine has performed numerous business valuations in the context of mergers and acquisitions, litigation support and corporate reorganizations and has extensive experience in fair value measurement for financial reporting purposes. She was seconded to London for two and a half years during which time she further developed her expertise in financial statement assurance, financial analysis and transaction support.

Catherine has also authored several articles and given presentations at various conferences on business valuation topics and has been recognized by the courts as an expert in business valuation. She has a distinguished academic background and has performed international engagements dealing with complex valuation-related issues.

**Register**      <https://cicbv.ca/events/webinar-evolution-of-best-practices-for-expert-witnesses-moore-v-getahun-decision-communications-with-counsel-and-use-of-draft-reports/>

**Fees**            \$ 75.00 + applicable provincial taxes

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**Log-in information will be sent to you the day before the webinar.**

**CE Credit**      1.5 hours