

PART TWO IN A FOUR-PART SERIES

## Defending Accountant Malpractice Claims

PRESENTED BY DRI'S PROFESSIONAL LIABILITY COMMITTEE

Defending claims against accounting professionals demands a working knowledge of the types of engagements accountants typically enter into, the typical claims made against accounting professionals, and the available lines of defense to those claims. This webcast, the second in a four-part series, serves as a primer on assessing and defending claims against accounting professionals and will provide an understanding of the various applicable standards and governing regulatory authorities. It will also provide a technical vocabulary to allow practitioners to become competent handling accountant claims and to develop deeper expertise in this area.

### Who Should Attend

- Attorneys with less than 10 years' experience practicing law
- Attorneys new to defending accounting professionals or attorneys wishing to move into the practice area
- Claims professionals who regularly handle accounting professional liability claims

### What You Will Learn

- Types of accounting engagements
- Regulatory authorities
- Essential elements of accounting malpractice and regulatory claims
- Defenses to claims against accounting professionals
- Measure of damages

### PROFESSIONAL LIABILITY WEBCAST SERIES

- 10/29/13 Part 1: Role of Ethics in Legal Malpractice Claims  
 11/19/13 Part 2: Defending Accountant Malpractice Claims  
 1/13/14 Part 3: Analysis of Claims Against Architects and Engineers  
 2/25/14 Part 4: Real Estate Professionals

The State Bar of California has approved this webcast for CLE credit. Please visit [www.dri.org](http://www.dri.org) for accreditation in your state.

**TUESDAY, NOVEMBER 19, 2013**  
 2:00 p.m. – 3:30 p.m. Eastern  
 1:00 p.m. – 2:30 p.m. Central  
 12:00 p.m. – 1:30 p.m. Mountain  
 11:00 a.m. – 12:30 p.m. Pacific

### Webcast Program Co-Chairs

**Seth F. Kirby**, Freeman Mathis & Gary LLP, Atlanta, Georgia  
**Andrew C. Sayles**, Connell Foley LLP, Roseland, New Jersey

### Law Institute Liaison

**Mark Solheim**, Larson•King, St. Paul, Minnesota

### Speakers



**Stephen J. Tully** is a shareholder of Garrett & Tully, P.C., in Westlake Village, California. He is an experienced litigator with a broad base of litigation expertise and significant trial experience. His practice focuses on business litigation, with a particular emphasis in legal malpractice and accountants' liability cases, where he has been at the forefront of major cases and developments.

**Thomas L. Hutchinson** is a shareholder of Bullivant Houser Bailey in Portland, Oregon. After obtaining an undergraduate degree in accounting, Mr. Hutchinson spent the first two years of his professional career as a financial consultant in an international accounting firm before attending law school. His practice focuses on the defense of accountants and business disputes involving complex financial and accounting issues. He advises accountants in connection with litigation, licensing and regulatory issues including matters involving the U.S. Attorney's Office, Securities and Exchange Commission, Commodities and Futures Trading Commission, and state regulators and licensing bodies.



**Stanley D. Sterna** is Director and Business Lead for CNA's Professional Services, Accountants Professional Liability Claim Unit in Chicago. Mr. Sterna has specialized in the defense of professionals for over 22 years. Since 1998, he has been involved in defending accountants professional liability claims and currently manages CNA's claim department devoted solely to the defense/management of such matters. As business leader, Mr. Sterna directs strategic planning for the unit, including claim management training, business planning, sales/marketing development and IT enhancement. He also assists in strategic planning for other CNA professional liability lines and works closely with some of the company's most valued internal and external business partners. Prior to his insurance career, he practiced law in the Chicago area, specializing in the defense of professionals.

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