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Joan A. Lipton, Ph.D.

Partner

Certified Public Accountant (CPA) in New York

Accredited in Business Valuation (ABV)

Certified in Financial Forensics (CFF)

A Partner in the New York office, Joan's very distinguished career includes expertise in the most complex valuation engagements. She has performed valuations of business interests and assets, provided valuation consulting services, forensic accounting and litigation support in connection with matrimonial matters, arbitration and mediation, shareholder and partnership disputes and other commercial litigation, estate and gift tax planning and other matters.

Joan is frequently appointed as a neutral expert by the courts in New York, Kings, Queens and Richmond Counties, as well as The Bronx, Westchester, Nassau and Suffolk Counties. Joan has also supervised complex valuation engagements in Connecticut, New Jersey, Pennsylvania, and other states. She is also voluntarily retained as a neutral expert by parties to litigation, mediation and the collaborative law process.

A frequent expert lecturer and presenter, Joan has lectured to judges, lawyers and accountants on valuation, forensic accounting and related topics. She has been a member of the Adjunct Faculty at New York University and a guest lecturer at Fordham University, Cardozo School of Law, and New York Law School.

Education

Joan holds a B.A. from Brown University, an M.B.A. from New York University and a Ph.D. from the University of Texas.

Professional Affiliations

Joan is a member of the American Institute of Certified Public Accountants (AICPA), the New York Society of Certified Public Accountants and the Estate Planning Council. She is also a Diplomate of the American Board of Forensic Accounting.

Lectures and Presentations

- Association of the Bar of The City of New York, Matrimonial Law Committee, "The Role of the Court-Appointed Neutral Expert," January 8, 2009
- Presentation on Family Support Obligations to Judges and Attorneys, Kings County, June 2008
- Association of the Bar of The City of New York, "Mock Trial," Role as Financial Expert, March 2008
- Fordham University School of Law, Lawyers' Committee Against Violence, "Mock Trial," March 2008
- Association of the Bar of The City of New York, "Mock Trial," March 2007
- New York City Bar Association, "Issues Relating to the Valuation of a Large Law Firm Interest," May 9, 2006
- Sanctuary For Families, "Enhanced Earning Capacity and Related Asset and Income Issues," March 8, 2006
- New York County Lawyers Association, "Overview of Financial and Valuation Issues Relating to Statements of Net Worth," December 7, 2005
- Institute For Divorce Financial Analysts, National Conference, "Forensic Accounting Aspects of Divorce Cases," June 2006 and October 2005.
- New York State Bar Association, "The Role of Neutral Experts from the Accountants' Perspective," The Equinox, Manchester, Vermont, July 8, 2005
- Brooklyn Bar Association, Family Law Section, "Forensic Accounting: The Determination of Income and How to Find It," Brooklyn, New York, May 16, 2005
- American Society of Appraisers, "Experts in the Role of Neutrals," May 5, 2005
- Cardozo Law School, "Equitable Distribution: Overview of Recent Cases," 2003 through 2009
- New York Law School, "Anatomy of a Divorce, Valuation Issues," March 17, 2005 and March 2009
- Westchester County Bar Association, Presentation on "Holterman v. Holterman" and "Rubino v. Rubino" Decisions, December 2, 2004
- Smith Barney/Women & Co., "Valuation Issues for Business Owners," November 17, 2004
- New York State Bar Association, "Tax and Deferred Compensation Issues," October 5, 2004
- New York County Lawyers Association, "Recent Cases and Selected Issues Pertaining to Business and Practice Valuations," New York, April 13, 2004
- Judicial Institute, "Matrimonial Seminar: The Business of Business Valuation," White Plains, New York, March 25, 2004
- The Association of the Bar of the City of New York, "The Grunfeld Sundae: Double Dipping," New York, February 11, 2004
- The Association of the Bar of the City of New York, "Through the Looking Glass: If There Was a Time for 'Enhanced Earning Capacity', Has That Time Passed?" New York, December 8, 2003
- New York County Lawyers' Association, Matrimonial Law Section, "The Grunfeld Decision (2002): EEC, Maintenance, and the Avoidance of Duplication," New York, April 28, 2003
- Nassau County Bar Association, Judicial Seminar, "Valuation Overview: Professional Practices, Enhanced Earning Capacity, and How to Avoid Duplication of Awards," February 6, 2003
- Association of the Bar of the City of New York, Matrimonial Law Committee, Judicial Seminar: Valuation Issues, "Valuation of Professional Practices and Enhanced Earning Capacity," August 26, 2002
- Westchester Women's Bar Association, "Selected Tax Issues in Matrimonial Cases," May 20, 2002
- Women's Bar Association of New York, "Valuation of Enhanced Earning Capacity, Income Duplication, and Cash Flow Issues," Annual Conference, May 19, 2001
- Brooklyn Bar Association, "How to Read Tax Returns (Personal and Business) In Matrimonial Cases," Brooklyn, New York, April 25, 2001
- Supreme Court of the State of New York, Presentation to Nassau County Judges, "Business Valuations: Issues Relating to Discovery and Valuation Dates," May 3, 2000
- New York State Bar Association, "Understanding Valuation Reports," Albany, New York, December 3, 1999
- Practising Law Institute, Co-Chair of Seminar, Basics of Accounting & Finance, "What Every Practicing Lawyer Needs to Know," 1999, 2000
- Practising Law Institute, Basic Accounting for the General Practitioner, "The Practical Application of Accounting and Auditing in Litigation Scenarios," 1998, 1999, 2000
- Metropolitan Women's Bar Association, "Valuation and Cash Flow Analyses in Matrimonial Actions," January 13, 1999
- New York County Bar Association, "Analyzing Stock Options (the DeJesus Formula) and Cash Flow Analyses," December 14, 1998
- New York Women's Bar Association, Matrimonial and Family Law Committee: "Tax and Financial Issues in Matrimonial Actions," November 20, 1997
- Office of Court Administration, Judicial Seminars: "Matrimonial Law Update," July 1997
- American Society of Appraisers: "Divorce Valuation in the Context of Recent Court Decisions," May 1997
- Practising Law Institute, Seminar on Basic Matrimonial Settlements: "Valuation of Professional Practices and Licenses," April 1997
- Institute for International Research, Seminar on Family Wealth Preservation: "Understanding Minority Interest and Lack of Marketability Discounts Applied in the Valuation of Family Business Interests," March 1997
- National Business Institute: "Attorneys and CPA's in New York: How to Utilize Accountant Expertise in Litigation," 1996
- National Business Institute: "Tax Aspects of Divorce in New York," all-day seminar, 1995
- New York County Lawyers' Association, Matrimonial Law Section, New Trends Committee: "Issues and New Trends in the Valuation of Law Practices," February 1994
- Fordham University School of Law, New York City: "Financial Accounting for Lawyers," 1993, 1994, 1995
- New York State Society of Certified Public Accountants, New York City: "Understanding Financial Statements," December 1994
- New York State Society of Certified Public Accountants: "Valuation Techniques and Strategies for Closely-Held Businesses," all-day seminar series for CPA's on valuation of businesses and intangible assets. Various locations in New York, Connecticut, Eastern and Midwest U.S., 1992, 1993, 1994, 1995, 1996
- New York State Society of Certified Public Accountants, New York City: First in a series of guest lectures for the Committee on the Advancement of Women in the Profession, January 1993
- Shearson Lehman Bros. and Fink Weinberger P.C./Pace University, White Plains, NY: "Valuation of Business Interests," June 1993
- Nassau Academy of Law, Nassau County, NY: "Tax Returns and Financial Statements," March 1992