

Ask the Forensic, Litigation & Valuation Expert

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Editor's note: This conversation reflects insights shared by experienced forensic, litigation, and valuation professionals. While the discussion originated within TXCPA's Business Valuation & Forensics community, the perspectives and lessons below are intended to be practical and relevant for CPAs today.

In this edition of *Ask the Expert*, we speak with Glenn Newman, CPA, MBA, CFE, ABV, CFFME, Managing Member of Newman Forensics, LLC in Philadelphia, Pennsylvania. Glenn has built a nationally recognized practice focused on complex litigation, economic damages, and intellectual property disputes, and is widely respected for his mentorship and leadership within the forensic accounting profession.

What led you to develop a specialty in intellectual property damages?

“Like many things in life, I was at the right place at the right time. As a young CPA — three years in and doing audits — I was very bored with compliance work and took a chance and interviewed for an analyst position in the firm's litigation group. What do you know — for some reason they offered me the job.

One of my first assignments was a patent infringement case involving a car wash. I had to do independent research, attend client meetings, tour the production facility, and perform numerous calculations. If I had paid more attention in English and grammar classes earlier, I could have been an immediate star — my writing skills had nowhere to go but up.

I had to be creative in my analyses because there was no work plan, no prior-year workpapers, and no budget. Less than four years later, I had my first experience as a testifying expert in federal court. I will remember that day in Toledo, Ohio, for the rest of my life.”

What are the most important takeaways CPAs should understand when approaching IP damages work?

“If you can manage complex litigation disputes, do not fear the unknown of intellectual property. Many of the same principles apply to IP infringement as they do in contract, acquisition, and other disputes — do not get intimidated.

Read the case law, especially the landmark disputes.

Avoid playing the role of an expert in the associated product or process, or in the law.”

What is one of the most memorable IP damages cases you’ve worked on, and why?

“I can’t say that any one case has been my favorite. I have been fortunate to work on many disputes, some involving high-profile matters and others that have been cited in numerous subsequent cases.

I tend to enjoy plaintiff cases — about half of my practice — because they are more challenging than simply defending a case.

If I had to choose, my favorite was my first major engagement in Toledo involving stretch-wrap machines. I was eight years out of college and assigned the engagement as a manager. I met with the attorney, handled communications, performed the analyses, and drafted the report. When it came time to issue the expert report, the attorney didn’t know who the partner was and suggested that I testify.

That experience gave me tremendous confidence. (It was not the best management by the partner on the matter, who had not even spoken to the client.)”

Glenn has mentored countless forensic and valuation professionals throughout his career and remains deeply involved in professional service and education. He is a trusted resource for attorneys and CPAs facing complex IP damages, construction, and economic disputes, and his influence extends well beyond individual engagements.

Glenn exemplifies the confidence, adaptability, and judgment required to navigate complex litigation — particularly in areas that may initially seem unfamiliar or intimidating.

Context: Insights drawn from expert discussions within TXCPA’s Business Valuation & Forensics programming.