

## The services we offer

- **Preparing reports** - Our reports always focus on the key issues and we are flexible in the format of our reports, which can be varied according to the requirements of instructing solicitors and Counsel.
- **Giving evidence** - We have a thorough knowledge of Court procedure and etiquette and we will provide a reliable and believable expert opinion. We understand our overriding duty is to assist the Court in arriving at its decision and continually work to preserve our objectivity and independence in this respect.

## Other Forensic Services

In addition to our particular expertise in matrimonial cases we are able to provide expert opinion and assistance in relation to Section 459 minority shareholder actions, consequential loss arising from contractual disputes and business interruption, personal injury and dependency claims.

We have excellent connections with other firms of forensic accountants and if we are unable to assist we are always prepared to make introductions to other experts who may be able to help.

## Your Contacts



Roger Walton FCA



Jon Dodge FCA

Walton Dodge Forensic has been established to provide litigation lawyers and their clients with an independent expert witness service which is fully informed and entirely relevant and one which has a no nonsense approach.

Roger Walton and Jon Dodge have between them over forty years experience as specialist Forensic partners providing litigation support services in a leading national firm of accountants and business advisors. Their experience covers general practice, corporate finance, taxation and a wide range of forensic accounting matters.

Roger and Jon both have experience of giving expert evidence in the High Court and County Court and are consulted in over 100 cases each year.

They have presented nationally and internationally on share valuation matters including at SFLA annual conferences.

Operating from offices in Norwich and Grays Inn Square, London, it is the aim of Walton Dodge Forensic to provide a relevant, practical and believable expert opinion which is proportionate to the issues in each case.

For further information about our Matrimonial Forensic Accounting Services please contact either Jon Dodge or Roger Walton at:

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## Our approach

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We understand it is important in Ancillary Relief Proceedings for instructing solicitors to be able to engage an expert witness with appropriate specialist experience, reputation and knowledge, who will provide a credible opinion firmly grounded in an understanding of the work of the matrimonial courts and who will have a demonstrable expertise of their subject matter.

We believe that the expert opinions we provide are:

- **Relevant** - We identify and focus on the key issues in each case.
- **Accessible** - Our reports focus on the relevant issues in a clear and uncomplicated manner.
- **Experienced** - We bring our many years of experience of Ancillary Relief related instructions to bear in a helpful and practical fashion.
- **Credible** - Our aim as experts is to communicate our opinions in a clear and uncomplicated way in order to assist the Court. We have given oral evidence in the County Courts and the High Court on many occasions.
- **Informed** - We have extensive forensic, corporate finance and general practice experience of the real world issues which are relevant to forming a reliable opinion which will assist in identifying an achievable settlement or judgement.
- **Cost Effective** - We aim for all our work to be focused, proportionate and valuable in the context of the proceedings.

## The services we offer

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We offer a full range of specialist Matrimonial Forensic Accounting Services including:

- **Expert or Single Joint Expert?** - We are regularly instructed in each capacity.
- **Preliminary reviews** - Our objectives are to identify the most significant aspects of a case and to highlight key areas for further investigation through a preliminary review of relevant documentation. We will provide a firm estimate of our likely costs at this early stage of our enquiries. Particularly helpful in preparing for a First Appointment.
- **Share and business valuations** - We have extensive experience of valuing interests in companies and businesses of all types specifically for the purposes of Ancillary Relief Proceedings, whether for an FDR or a fully contested hearing. We are used to dealing with complex share structures, quasi partnerships and with accounts which may not immediately reveal all the financial information relevant to the case. We carry out the necessary investigations and research to ensure our opinion is properly supported and are aware of up to date cases relating to Financial Provision.
- **Liquidity reviews** - We are aware of the importance of available funds and liquidity in Ancillary Relief Proceedings. Our work is carried out with this in mind and we use our taxation and corporate finance knowledge to identify potential liquidity and especially how it might be extracted from the family business.

## The services we offer

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- **Taxation considerations** - We are experienced in all taxation matters relating to marriage breakdown and Ancillary Relief Proceedings, both in the context of personal taxation and capital taxation as relating to valuations and the extraction of funds from privately owned businesses.
- **Meetings between Accountants** - We usually seek a meeting with the Respondent's or Applicant's accountant at the earliest possible stage in order to review working paper files and obtain valuable background information. In meetings with other experts we aim to identify and narrow the issues and any differences of opinion.
- **Conferences with Counsel** - We are used to working closely with Counsel and we are able to advise Counsel on the strengths and weaknesses of the financial aspects of the case. We provide a written commentary on other experts' reports. We ensure that our opinions in conference are consistent with those that we will deliver in Court.
- **Settlement negotiations** - If requested, we can assist instructing solicitors with negotiations and are used to dealing with other experts in this capacity.
- **Questionnaires** - We are able to provide relevant detailed financial questions for inclusion in the questionnaire. We will also provide further questions for any supplementary questionnaires as a case develops.