

Attorney Lance McCardle

Presenting “Calculating Damages in Investment Loss Cases” at the Society of Louisiana Certified Public Accountants’ Forensic Litigation & Valuation Services Conference



In investment loss claims, plaintiffs will typically utilize one of three types of damages analyses: 1) capital loss; 2) well-managed portfolio; or 3) rescission. In contrast, defendants will often argue that a Net-Out-of-Pocket or “NOP” damages analysis is most appropriate. This presentation will discuss a few different types of investment loss cases, detail these four calculation methodologies, and highlight the key strengths/weaknesses of each approach.

Lance practices in the areas of securities arbitration and litigation, environmental law, and general commercial litigation. Lance regularly represents investors (both individuals and institutions) in claims against their brokers, investment advisors, and/or investment banks in court or in arbitration proceedings administered by the Financial Industry Regulatory Authority (“FINRA”).

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