

Making the Complex Clear
Communicating Expert Opinions Through Storytelling & Visualization

2026 Fall Forensics Institute

forvis mazars

Meet the Presenters



Brian Burns

Partner



Alex Bretthauer

Manager

© 2026 Forvis Mazars, LLP. All rights reserved.

Agenda

1. Why Communication Matters
2. The Legal Framework
3. Storytelling in Expert Reports
4. Visualization Best Practices
5. Mediation
6. AI in Visualization Design
7. Takeaways and Q&A



© 2026 Forvis Mazars, LLP. All rights reserved.

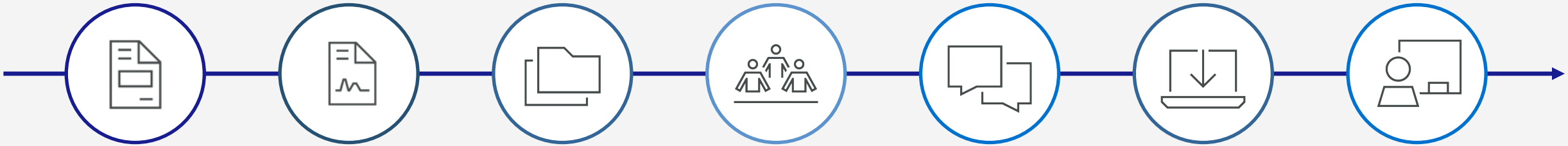
“Great analysis has little value if the audience cannot understand it.”



© 2026 Forvis Mazars, LLP. All rights reserved.

Where Experts Communicate

Written **Live**



Expert reports | Affidavits and declarations | Pleadings and disclosures | Mediation statements | Depositions | Trial demonstratives | Live testimony

© 2026 Forvis Mazars, LLP. All rights reserved.

Counsel & Expert
Distinct Roles



Counsel

- Frames legal theories
- Defines disputed issues
- Presents case themes



Expert

- Independent analysis
- Explains methodology
- Educates the trier of fact

© 2026 Forvis Mazars, LLP. All rights reserved.

The Rules Shape the Report



Federal court

Detailed Rule 26 reports

Complete disclosure



State court

Standards vary

Sometimes limited reporting



Arbitration

Flexible procedures

Panel preferences

© 2026 Forvis Mazars, LLP. All rights reserved.

Not in the Report

Can It Be Used at Trial?

It depends.

Demonstratives

Summary exhibits

Pedagogical aids

© 2026 Forvis Mazars, LLP. All rights reserved.

Know Your Audience

Judge Focused and efficient

Jury Educate and simplify

Arbitration Panel Sophisticated and commercial

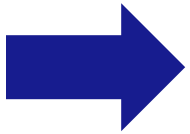


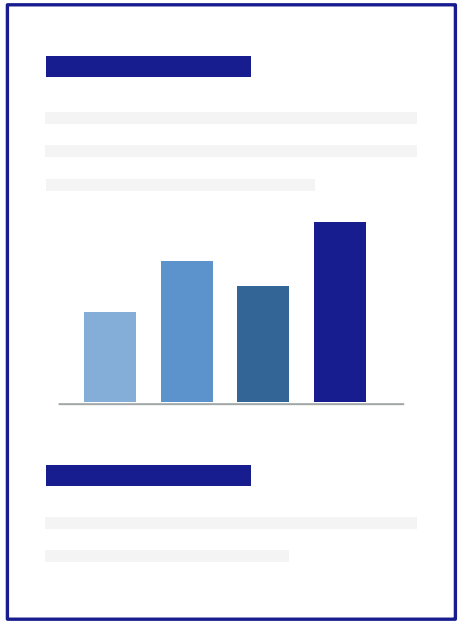
© 2026 Forvis Mazars, LLP. All rights reserved.

The Report Is the First Demonstrative

Common problems

- Dense writing
- Jargon
- Data dumps





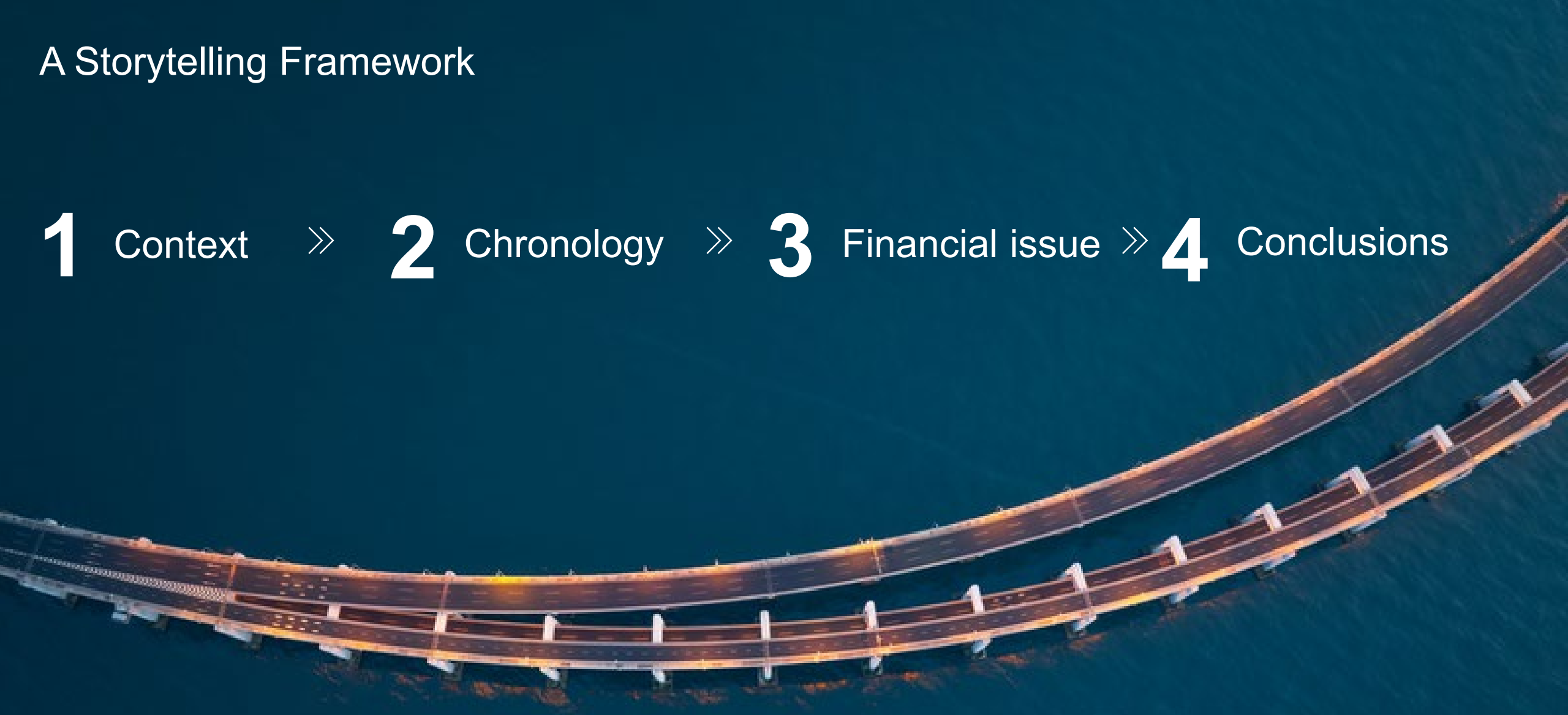
Better approach

- Narrative structure
- Logical flow
- Progressive education

© 2026 Forvis Mazars, LLP. All rights reserved.

A Storytelling Framework

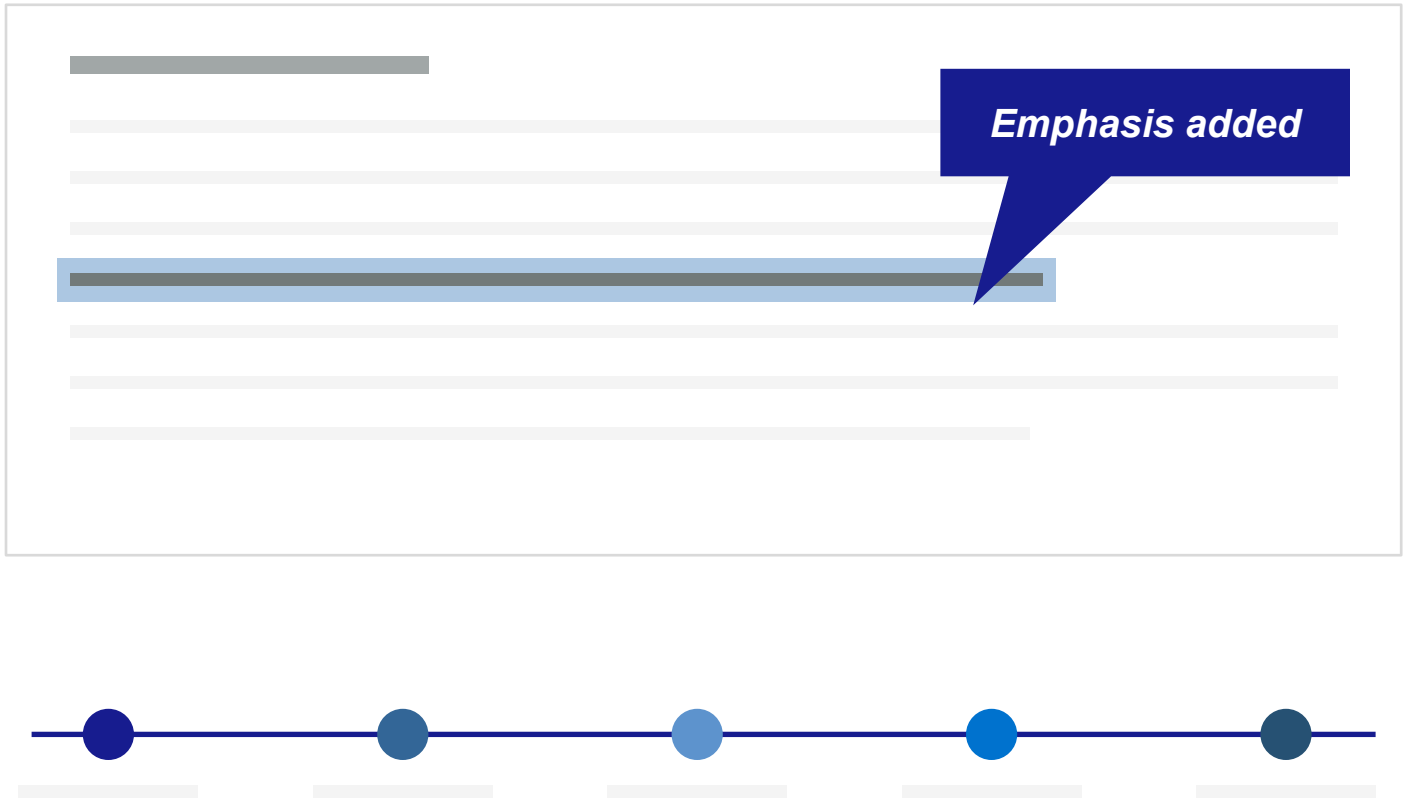
1 Context » **2** Chronology » **3** Financial issue » **4** Conclusions



© 2026 Forvis Mazars, LLP. All rights reserved.

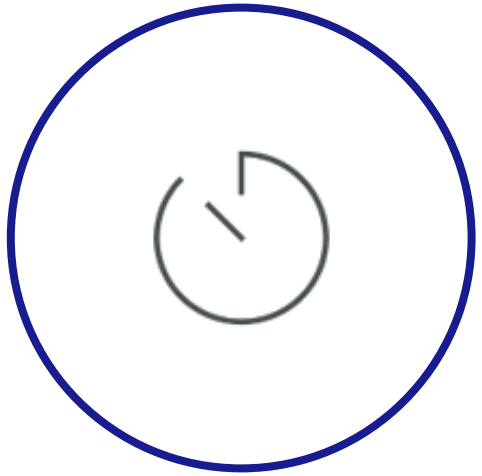
Show, Don’t Just Tell

- Timelines
- Key document excerpts
- Quotes with emphasis added
- Contract provisions
- Deposition testimony

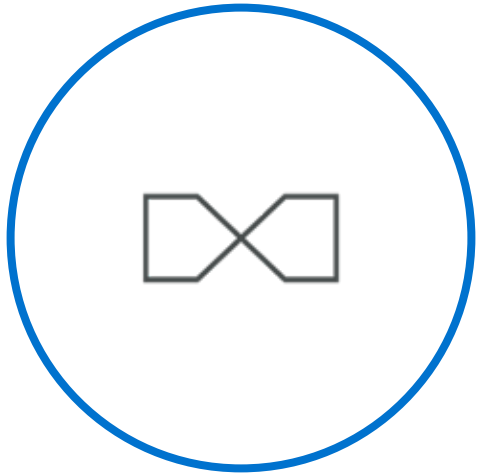


© 2026 Forvis Mazars, LLP. All rights reserved.

Why Visuals Matter



Faster comprehension



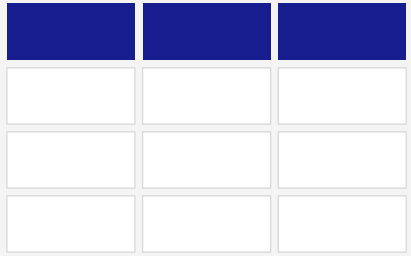
Improved retention



Greater engagement

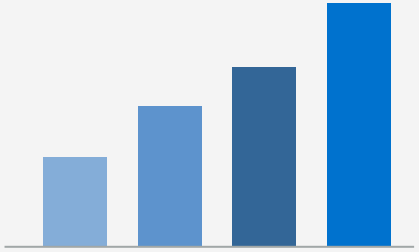
© 2026 Forvis Mazars, LLP. All rights reserved.

Match the Visual to the Question



Data table

When precision matters



Chart

Trends and comparisons



Process diagram

Methodology steps



Timeline

Chronology to conclusion

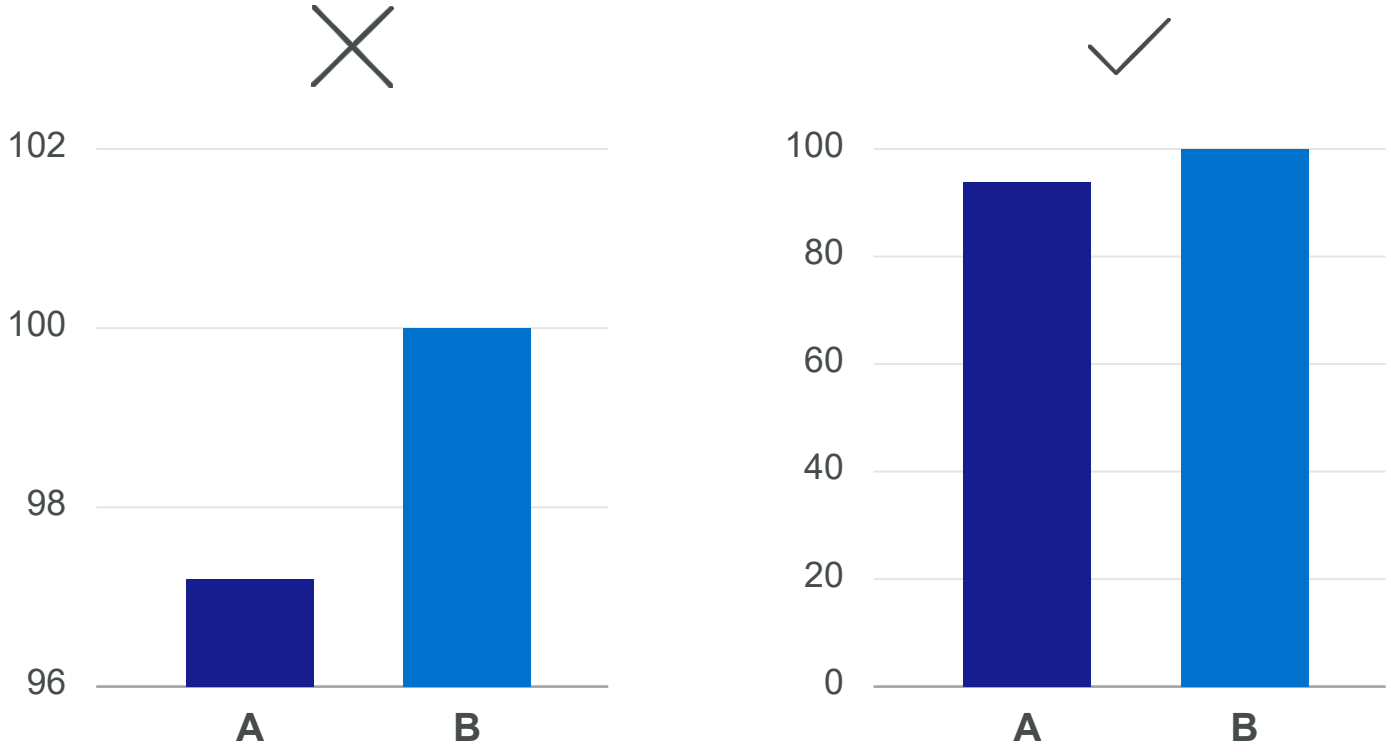
© 2026 Forvis Mazars, LLP. All rights reserved.

Trial Demonstratives: What Works vs. What Fails

Works	Fails
One message per slide	Spreadsheet screenshots
Focused visuals	Tiny text
Call-out boxes	Too many numbers
Progressive builds	Overly complex process maps

© 2026 Forvis Mazars, LLP. All rights reserved.

Be Persuasive, but Honest

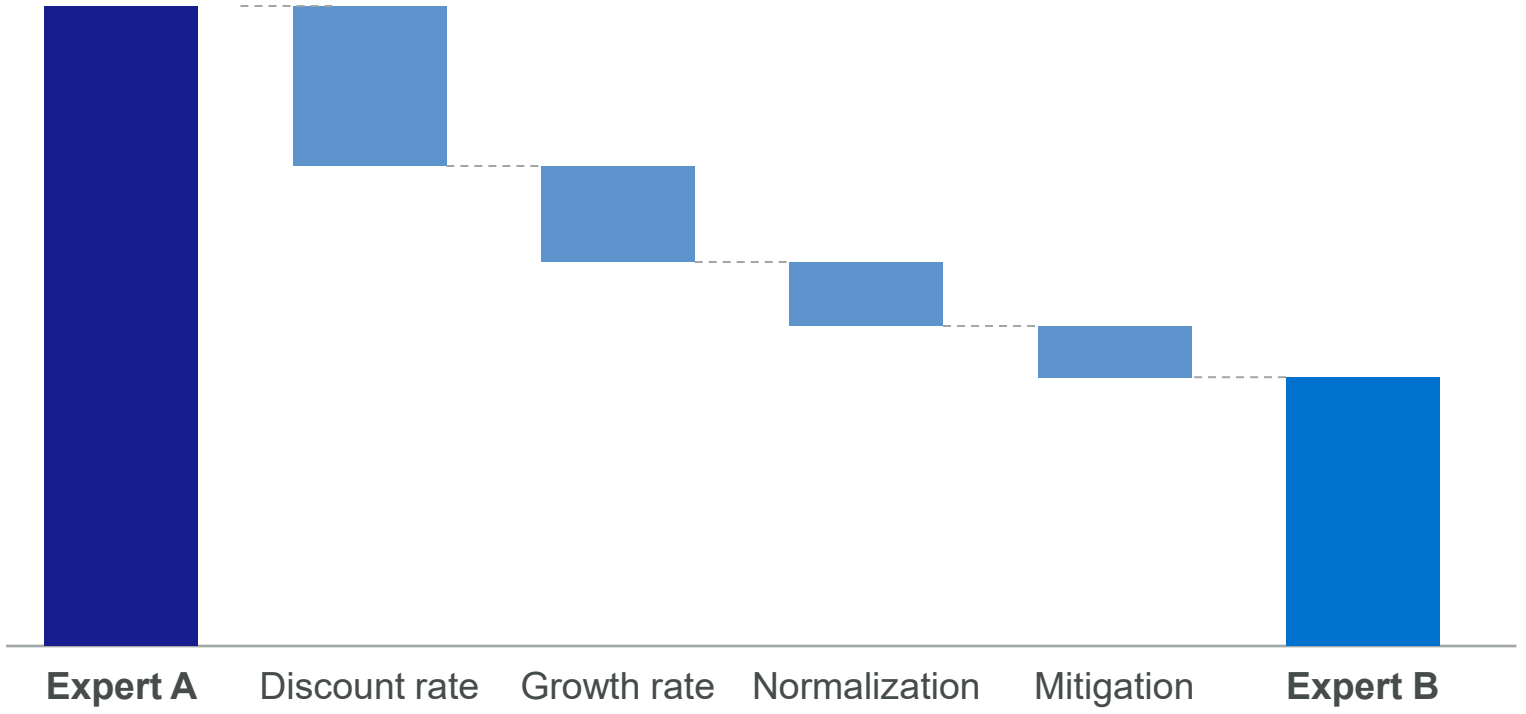


Poor visuals can create inconsistencies, overstate conclusions, and invite credibility attacks

© 2026 Forvis Mazars, LLP. All rights reserved.

Mediation: Distilling the Dispute

Key differences: **Assumptions** **Methods** **Inputs**



Trial persuades.
Mediation resolves.

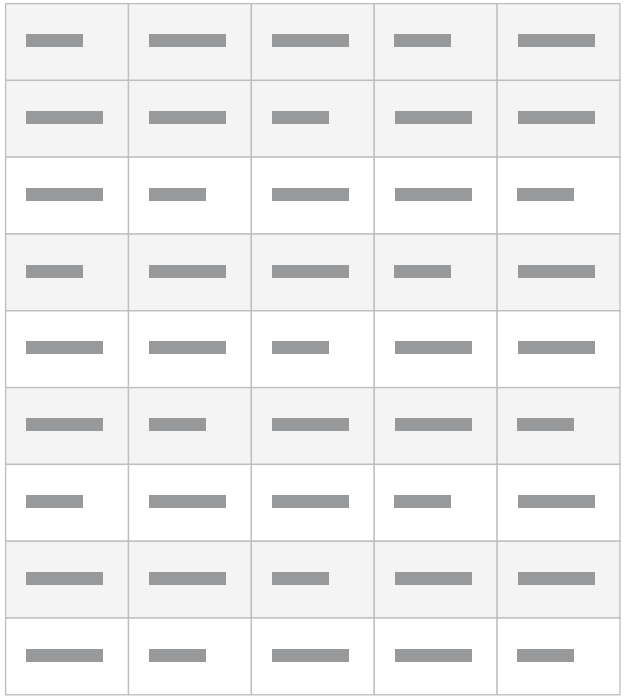
© 2026 Forvis Mazars, LLP. All rights reserved.

AI: A Design Assistant, Not an Author

Appropriate	Brainstorming	Alternative visual concepts	Design and layout
Not appropriate	Generating opinions	Replacing judgment	Substituting for analysis

© 2026 Forvis Mazars, LLP. All rights reserved.

Before and After: Same Data, Clearer Story



Dense table

Timeline

Waterfall

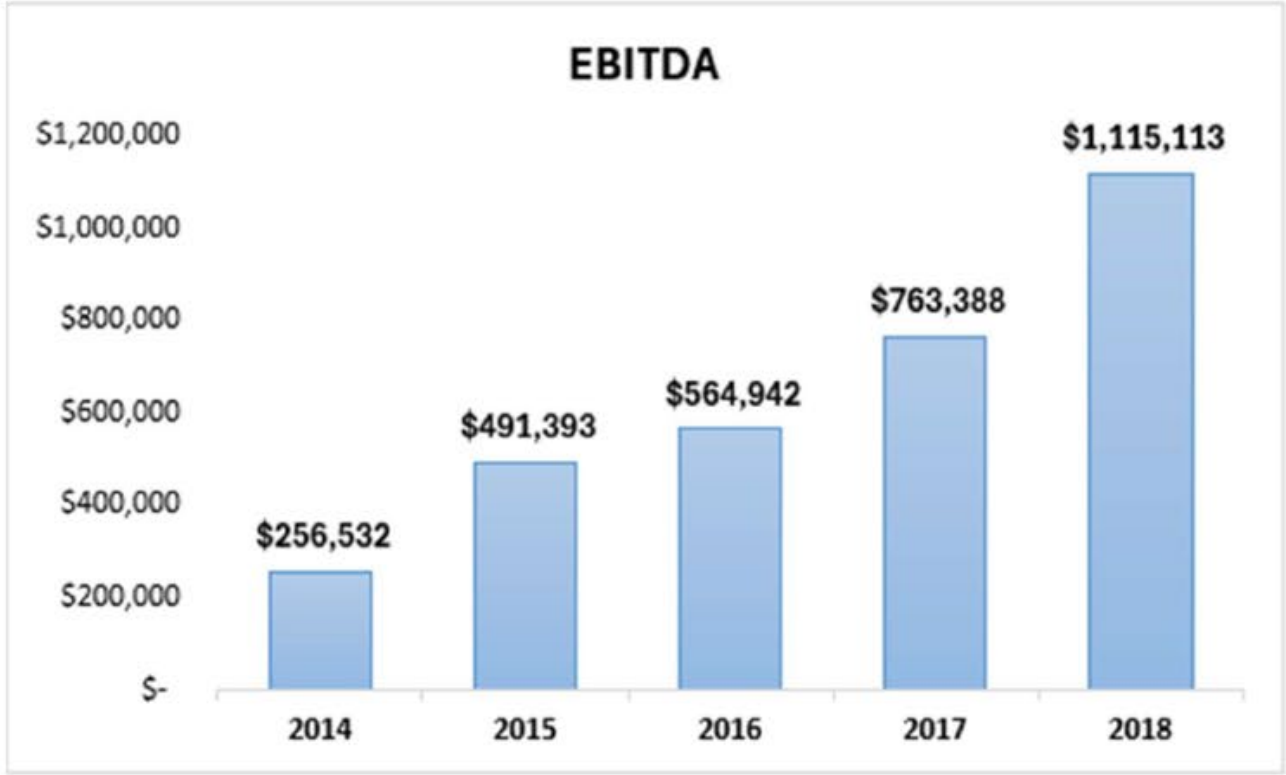
Transaction flow

Bar chart

© 2026 Forvis Mazars, LLP. All rights reserved.

Historical Revenue and EBITDA Charts





© 2026 Forvis Mazars, LLP. All rights reserved.

Pre and Post-Harm Revenue



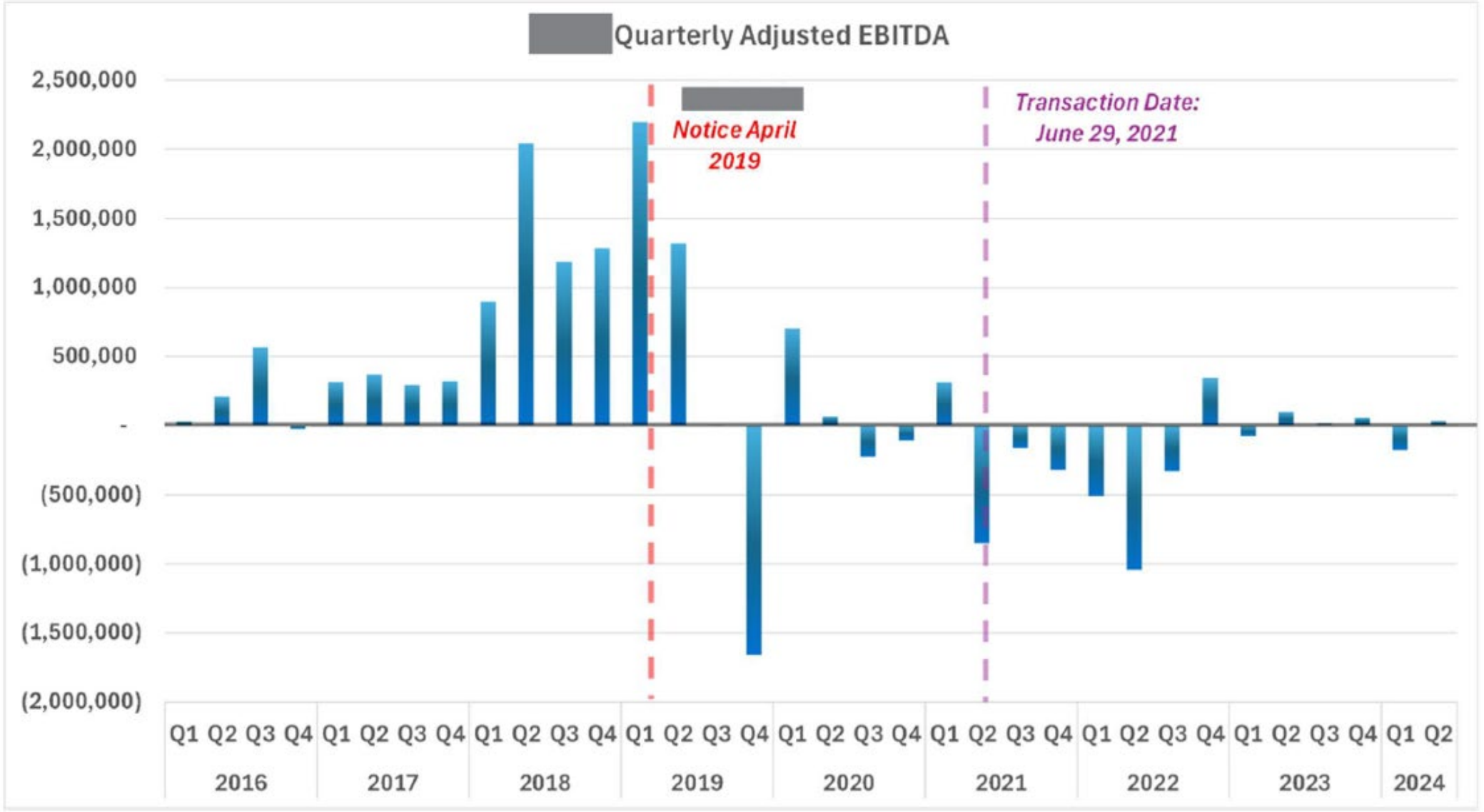
© 2026 Forvis Mazars, LLP. All rights reserved.

Pre and Post-Harm Revenue



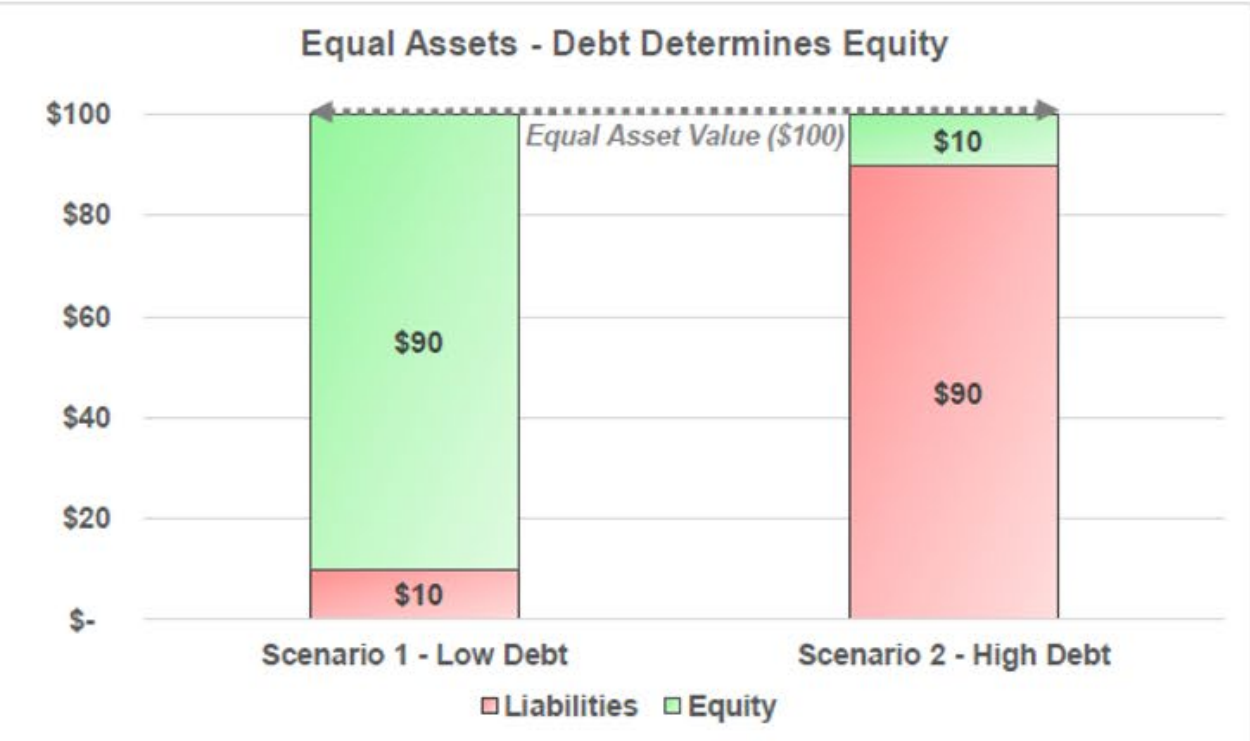
© 2026 Forvis Mazars, LLP. All rights reserved.

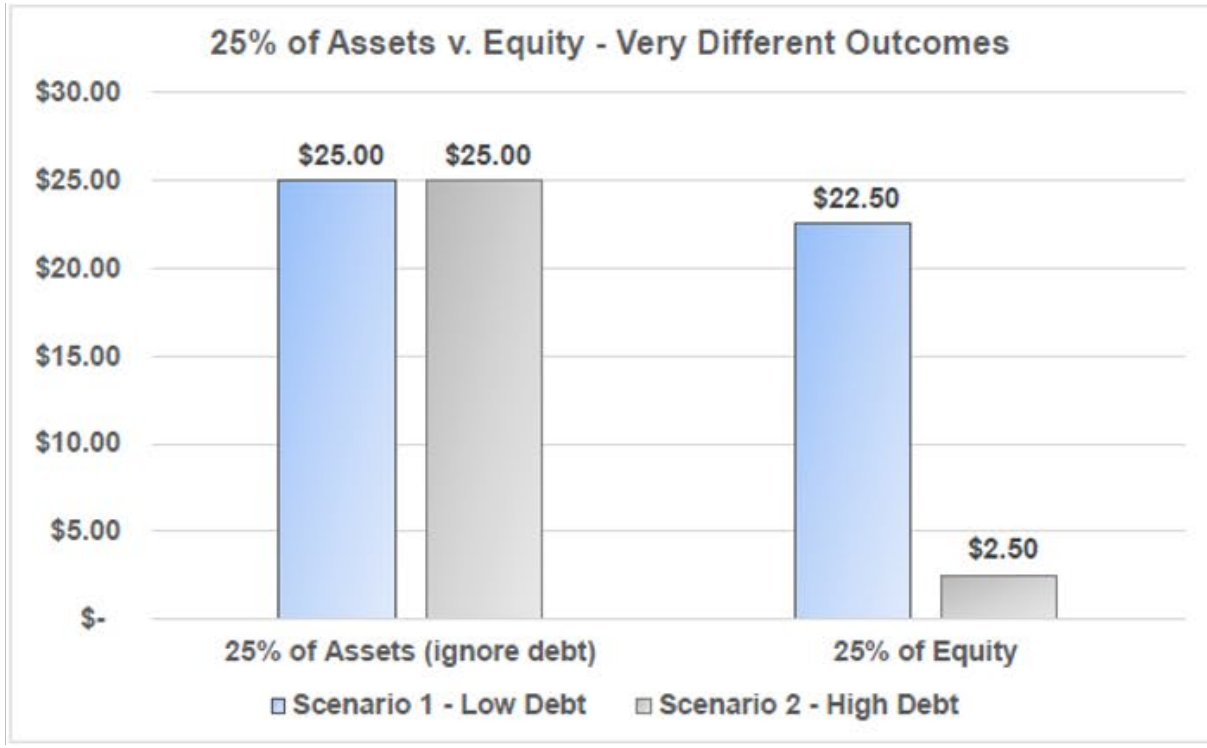
Pre and Post-Harm EBITDA



© 2026 Forvis Mazars, LLP. All rights reserved.

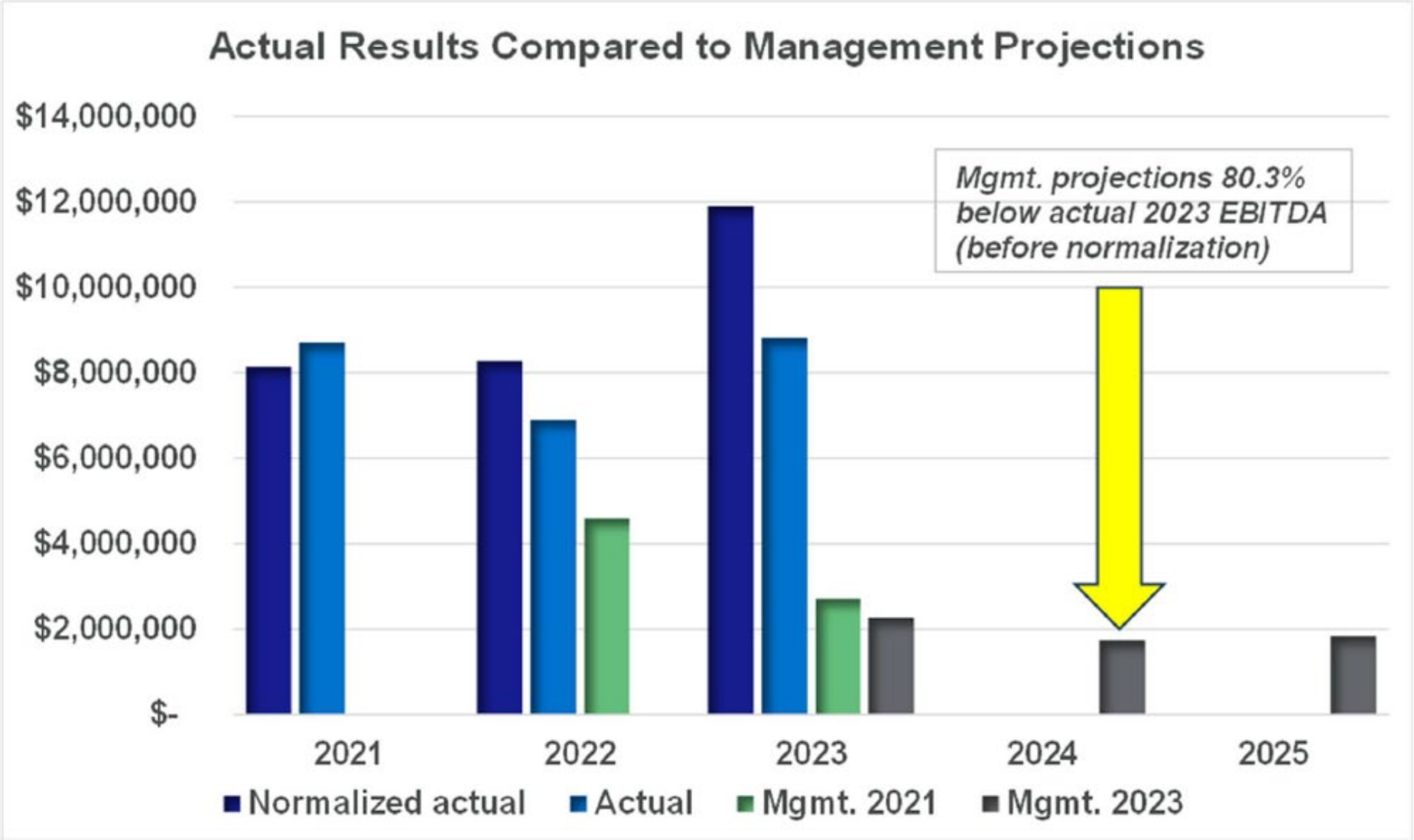
Illustration of Assets vs Equity – Financial Reasonableness





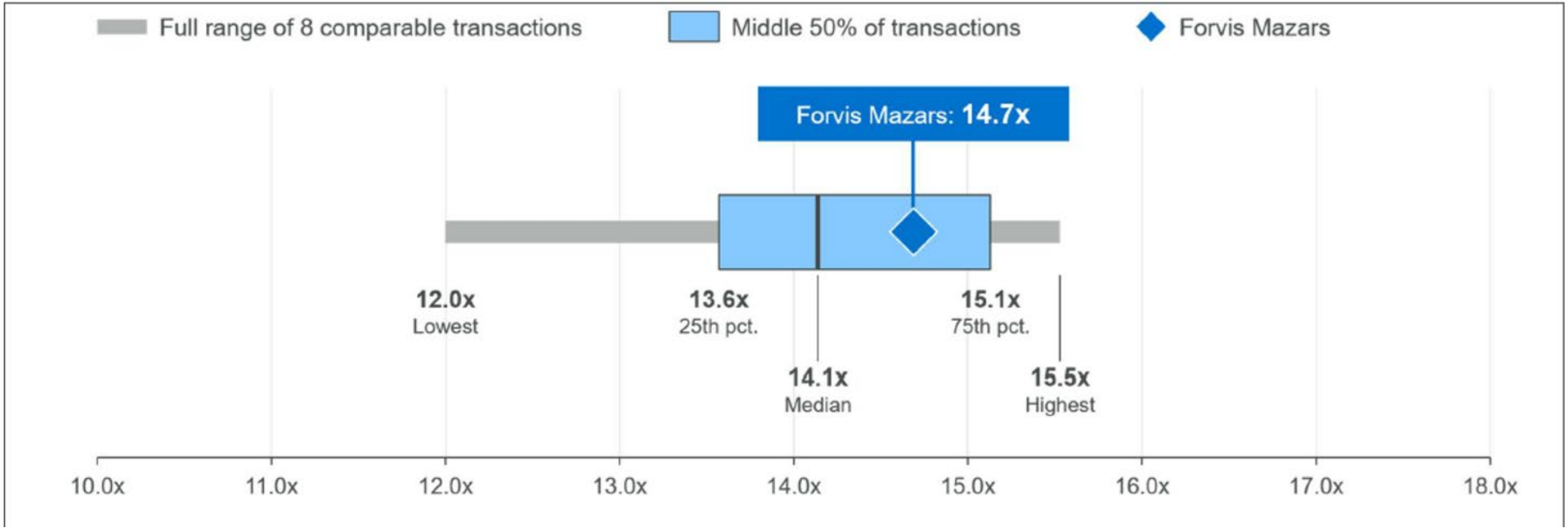
© 2026 Forvis Mazars, LLP. All rights reserved.

Assessing Reasonableness of Management Projections



© 2026 Forvis Mazars, LLP. All rights reserved.

EV / EBITDA Multiple Comparison Chart



© 2026 Forvis Mazars, LLP. All rights reserved.

Five Rules for Clear Expert Communication



1. Start with the story, not the calculation
2. Establish chronology before conclusions
3. Use visuals to educate, not decorate
4. Tailor to judges, juries, arbitrators, and mediators
5. Embrace technology, never outsource judgment

© 2026 Forvis Mazars, LLP. All rights reserved.

Persuasive experts make sophisticated analyses understandable.

Questions?

© 2026 Forvis Mazars, LLP. All rights reserved.



Don’t Miss the Last Session of the

2026 Fall Forensics Institute

From Risk to Resilience: Build a Fraud-Ready Organization

Thursday, November 19 at 12:00 p.m.-1:00 p.m. ET

© 2026 Forvis Mazars, LLP. All rights reserved.

forvis mazars

Contact

Forvis Mazars

Brian Burns
Partner
P: 804.474.1240
brian.burns@us.forvismazars.com

Alex Bretthauer
Manager
P: 804.250.9477
alex.bretthauer@us.forvismazars.com

The information set forth in this presentation contains the analysis and conclusions of the author(s) based upon his/her/their research and analysis of industry information and legal authorities. Such analysis and conclusions should not be deemed opinions or conclusions by Forvis Mazars or the author(s) as to any individual situation as situations are fact-specific. The reader should perform their own analysis and form their own conclusions regarding any specific situation. Further, the author(s)' conclusions may be revised without notice with or without changes in industry information and legal authorities.

© 2026 Forvis Mazars, LLP. All rights reserved.