

ASA Philadelphia Chapter | Business Valuation | Virtual Seminar Sep. 22, 2022 Thursday

8:00 am - 8:15 am REGISTRATION

8:15 am - 8:30 am WELCOME REMARKS, INTRODUCTION, AGENDA, HOUSEKEEPING RULES

Steven Juska, ASA, Managing Director, CBIZ - Conference Co-Chair

Sean O'Reilly, ASA, Partner, CFGI - Conference Co-Chair

Tom Rohrer, Conference Zoom Tech Assistant

8:30 am - 9:15 am BUSINESS VALUATION TOPICS

Francis P. Egan, CFA, ASA

Senior Manager | Wipfli LLP, Radnor PA | 610.565.3930 | fegan@wipfli.com

9:15 am - 10:00 am COMPLEX FINANCIAL INSTRUMENTS - HARD TO VALUE SECURITIES

Tom Carr, CFA

Director | CFGI, Washington D.C. | 301.514.6210 | tcarr@cfgi.com

10:00 am - 10:20 am COFFEE/TEA BREAK

10:20 am - 11:10 am HEALTHCARE VALUATION

Deepa Menon

Managing Director | CBIZ, Dallas TX | 972.406.6913 | dmenon@cbiz.com

Tami Bolder, CPA/ABV, ASA, MBA, DBA

Senior Manager | CBIZ, Akron OH | 330.670.7237 | tmbolder@cbiz.com

11:10 am - 12:00 pm ARE WE IN A RECESSION? WHY OR WHY NOT?

William Dunkelberg, Ph.D.

Chief Economist | NFIB

12:00 pm - 1:00 pm LUNCH

1:00 pm - 2:20 pm CANNABIS INDUSTRY VALUATION

Ron Seigneur, CPA/ABV, ASA, CVA

Partner | Seigneur Gustafson LLP, Lakewood, CO | 303.980.1111 | ron.seigneur@cpavalue.com

Stacey Udell, CPA/ABV/CFP, CVA

Principal | HBK Valuation Group, Cherry Hill, NJ | 856.486.2299 | sudell@hbkgv.com

2:20 pm - 2:40 pm INTERACT WITH CONFERENCE CO-CHAIRS / COFFEE BREAK

Steven Juska, ASA, Managing Director, CBIZ - Conference Co-Chair

Sean O'Reilly, ASA, Partner, CFGI - Conference Co-Chair

2:40 pm - 3:20 pm VALUATION CONSIDERATIONS IN PERIODS OF VAST ECONOMIC UNCERTAINTY

Paul Balynsky, CFA, CPA/ABV

Managing Director | VRC, Yardley PA | 609.243.7027 | pbalynsky@valuationresearch.com

3:20 pm - 4:00 pm SEC PROPOSED RULES ON CLIMATE CHANGE DISCLOSURE REQUIREMENTS

John Barton, ASA, CPA

President | Brandywine Valuation Consultants, Lyndell PA | 484.678.6580 | jbarton@bwvaluations.com

CONFERENCE STEERING COMMITTEE CO-CHAIRS

Steven Juska, ASA, Managing Director, CBIZ | W: 610.862.2343 | M: 215.205.5213 | sjuska@cbiz.com

Sean O'Reilly, ASA, Partner, CFGI | W: 215.558.2903 | M: 610.348.9519 | soreilly@cfgi.com

NASBA and Continuing Professional Education (CPE) Credit: 8.0 hours.

Coordinator: Poonam Vaidya, ASA | M: 786.223.0963 | pvaidya09@gmail.com