

2022 ASA Philadelphia Chapter Business Valuation “Virtual” Conference

The American Society of Appraisers Philadelphia Chapter is pleased to present their 2022 ASA Business Valuation Virtual Conference to be held on Thursday, September 22, 2022. The conference will run from 8:00 a.m. to 4:00 p.m. Eastern Standard Time (EST). Zoom invites will be sent out ahead of time. Early-bird registration fees are available through September 9, 2022, at midnight.

Range of Presentation Topics and Agenda

The conference agenda will feature presentations from nationally recognized speakers who are professional leaders, covering a range of topics. Listed here are the speakers and topics.

BUSINESS VALUATION TOPICS



Francis P. Egan, CFA, ASA, Senior Valuation Manager, Wipfli LLP, Radnor PA

A seasoned professional, with over 20 years of experience, Mr. Egan provides valuation services for a variety of purposes. Qualified as an expert witness, he has provided expert testimony in Delaware County, Pennsylvania. Fran has presented on a variety of topics to various organizations, including the AICPA and the Delaware County Bar Association.

COMPLEX FINANCIAL INSTRUMENTS – HARD TO VALUE SECURITIES



Tom Carr, CFA, Director, CFGI, Washington D.C.

Tom specializes in advanced financial modeling and valuation of complex financial instruments. Tom has extensive experience with a variety of fixed income and derivative products, such as interest rate swaps/swaptions, structured products, credit/FX/commodity derivatives, bonds/loans, convertible debt, warrants, and allocation of enterprise/equity values across simple and complex capital structures.

HEALTHCARE VALUATION



Deepa Menon, Managing Director, CBIZ, Dallas TX

Ms. Menon is a managing director in the Southwest Region of CBIZ Valuation Group; responsible for client service and business development related to financial valuation. Ms. Menon has over 19 years of valuation experience, specializing in valuation consulting, financial advisory, and valuations of intangible assets for tax, financial reporting, mergers and acquisitions, & regulatory compliance.



Tami Bolder, CPA/ABV, ASA, MBA, DBA, Director, CBIZ, Akron OH

Tami is a Director, with over 17 years experience in valuation projects for M&A, estate and gift tax reporting, SBA loans, purchase price allocations, goodwill impairment testing; and litigation services for shareholder disputes, civil litigation, domestic relations, commercial and personal damages.

ARE WE IN A RECESSION? WHY OR WHY NOT?



William Dunkelberg, Ph.D. Chief Economist, NFIB

William Dunkelberg, PhD, served on the faculties of Stanford's Graduate School of Business, Purdue's Krannert Graduate School of Management, and Temple University's Fox School of Business where he served as Dean for 8 years. He serves as the Chief Economist at the National Federation of Independent Business. He has been involved in the starting of many new businesses; served on the Boards of several firms; published articles in numerous journals; and served as an advisor to many government organizations.

CANNABIS INDUSTRY VALUATION



Ron Seigneur, CPA/ABV, ASA, CVA, Partner, Seigneur Gustafson LLP, Lakewood, CO

Ron has over 30 years of valuation experience and been an expert witness in several jurisdictions and has served as trustee, mediator, arbitrator and special master of the court. Ron is active nationally as an educator and author of valuation science and has written and taught valuation courses for the AICPA, NACVA, state bar associations, and the EPA.



Stacey Udell, CPA/ABV/CFF, CVA, Principal, HBK Valuation Group, Cherry Hill, NJ

Stacey has more than 20 years experience in business valuation, forensic accounting, economic damages, and litigation support services. Stacey is a core member of HBK's Cannabis Solutions Group and works with clients applying for licenses, operating entities, and helping cannabis entities develop strategies to maximize the value of their firms for a potential exit. Her clients include cultivators, processors, retailers, vertically integrated operators, and ancillary service providers.

VALUATION CONSIDERATIONS IN ECONOMIC UNCERTAINTY



Paul Balynsky, CFA, CPA/ABV, Managing Director, VRC, Yardley PA

Paul is a Managing Director based in Yardley, PA and is a senior member of VRC's Portfolio Valuation Practice. Mr. Balynsky specializes in valuations of portfolios of privately-held securities primarily for financial reporting purposes. He has performed valuations of securities along the entire capital structure including senior debt, subordinated debt and complex, multi-class equity structures. Prior to joining VRC, Paul held the position of manager of financial analysis for the PCAOB.

SEC PROPOSED RULES ON CLIMATE CHANGE DISCLOSURE REQUIREMENTS



John Barton, ASA, CPA, President, Brandywine Valuation Consultants, Lyndell PA

As President of Brandywine Valuation Consultants, John is responsible for the analysis and valuation of closely held entities and intangible assets. He provides expert witness testimony in litigation matters. John is past Chairman of the ASA's Business Valuation Committee, and ASA's Education Committee in charge of course content and development for the ASA's business valuation educational program.

Why Attend?

Timely Updates on Topics of Current Interest – Session content will represent leading-edge topics selected for their importance to professionals that perform complex securities valuations.

Nationally Recognized Speakers – This is an exclusive opportunity to obtain insights from nationally recognized leaders in the profession.

Practitioner Focus – This conference is focused on the needs of valuation and accounting professionals involved in the business valuation profession. Insights can be immediately employed in the technical or business management of your professional practice.

ASA and NASBA Continuing Professional Education – The conference will provide continuing professional education credit by both the American Society of Appraisers (ASA) and the National Association of State Boards of Accountancy (NASBA). This is a timely and cost-effective means of obtaining CE hours for your ASA reaccreditation and CPE hours for your CPA license.

CEIV(TM) Continuing Professional Development – The conference qualifies for Certified in Entity and Intangible Valuations™ (CEIV™) Credential Continuing Professional Development (CPD) credit.

Competitive Pricing – ASA continues to price the conference at an extremely low cost as a benefit to its membership and the professional community at large.

NASBA and Continuing Professional Education (CPE) Credit

The American Society of Appraisers is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit.

CPE Credit: 8.0 hours.

Questions

If you have any questions, please contact the conference organizers noted below.

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

Coordinator

Poonam Vaidya, ASA | M: (786) 223-0963 | pvaidya09@gmail.com