

Schedule of Events

| Wednesday, June 5, 2013 | | |
|----------------------------|---|---|
| Time | | |
| 6:15–8:30 | Continental Breakfast and Registration | |
| 6:30–8:15 2 hours CPE | NACVA Case Analysis in Person (CAP) (Pre-Registration Required) | |
| Fields of Study | 1 Hr - AC, 1 Hr - SK&A | |
| 7:00–7:50 1 hour CPE | You, Your Practice, and Assets are at Risk. Don't Roll the Dice with Practice Risk Management! (James Frazier, Lari Masten) | |
| Fields of Study | 1 Hr - SK&A | |
| 8:30–5:15 | Pre-Conference Symposium Current Update in Valuations (CUV) | CBA Accreditation Workshop |
| 8:30–10:15 2 hours CPE | Common Misconceptions Regarding SBBI Cost of Capital Information (Kevin Piccolo) | CBA Accreditation Workshop (Ronald Rudich) |
| Fields of Study | 2 Hrs - SK&A | |
| 10:15–10:30 | Morning Break and Registration | |
| 10:30–12:15 2 hours CPE | Evolving and Contradictory IRS Views on the Use of Restricted Stock Data (Lance Hall) | CBA Accreditation Workshop (Continued) |
| Fields of Study | 2 Hrs - SK&A | |
| 12:15–1:30 | Lunch on Own and Registration | |
| 1:30–3:15 2 hours CPE | Federal and State Case Law Update (Mel Abraham, Peter Agrapides) | CBA Accreditation Workshop (Continued) |
| Fields of Study | 1 Hr - BE, 1 Hr - SK&A | |
| 3:15–3:30 | Afternoon Break and Registration | |
| 3:30–5:15 2 hours CPE | Uncovering Critical Issues for Valuators (Marc Bello, Melissa Bizyak, Robert Grossman) | CBA Accreditation Workshop (Continued) |
| Fields of Study | 1 Hr - AC, 1 Hr - AP | 2 Hrs - AC, 4 Hrs - SK&A, 2 Hrs - ST |
| 6:00 depart | Adams Morgan, DuPont Circle, and Embassy Row Dine Around (see page 23) | |

NACVA and the CTI wish to thank the 2013 Annual Conference Planning Committee for their support in organizing this year's conference faculty and topics.

Participant Cancellations

Cancellations received in writing two weeks prior to the first day of the conference will be eligible for a prompt refund less a \$150 administration fee. Cancellations received less than two weeks prior to the first day of the scheduled event (and no-shows) will be issued, upon request, a credit which may be used toward another seminar, self-study course, software, or other product sold by NACVA/CTI. There are no exceptions to this policy.

NACVA Course Cancellation Policy

NACVA reserves the right to cancel or replace topics and/or presenters if circumstances require.

Online
Updates:



Thursday, June 6, 2013

| Time | | | | | |
|----------------------------|--|---|---|---|---|
| 6:30–8:00 | Continental Breakfast, Registration, and Exhibits | | | | |
| | Early Morning CPE | | | | |
| 7:00–7:50 1 hour CPE | Strengthening Your Business Valuation Reports to Grow Your Practice: An Insider's Look into the Business Appraisal Review Accreditation (ABAR) Workshop (Howard Lewis, Frank Rosillo) | | Using Your International BV Network (Bill Hanlin) | | |
| Fields of Study | 1 Hr - CM | | 1 Hr - SEB | | |
| 8:00–9:55 2 hours CPE | Welcome Address and Opening Remarks (2013 Conference Chairs: Rod Burkert, Mark Kucik, Rebekah Smith) | | | | |
| Fields of Study | Keynote Address The Firm of the Future: A Radical Business Model for Professional Firms (Ron Baker) 2 Hrs - MK | | | | |
| 9:55–10:15 | Morning Break and Exhibits | | | | |
| 10:15–11:55 2 hours CPE | Keynote Address Advanced Pricing: Tools for Increasing Revenue and Pricing Competencies (Michelle Golden) | | | | |
| Fields of Study | 2 Hrs - BM&O | | | | |
| 11:55–12:55 | Conference Luncheon and Exhibits | | | | |
| 11:55–12:55 | AlgoValue Luncheon Valuation of Equity Securities of Privately Held Companies—presentation, demo, and raffle | | | | |
| Session Tracks | Valuation Accelerator <small>Moderated by Rod Burkert and Mark Kucik</small> | Valuation Symposium | Financial Forensics Accelerator <small>Moderated by Rebekah Smith and Howard Zandman</small> | Financial Forensics Symposium | Healthcare Valuation Symposium |
| 12:55–1:50 1 hour CPE | Managing the Engagement (Chris Hamilton) | Top Five Commercial Litigation Engagements You're Missing Out On (Neil Beaton) | Role of the Expert (Jeff Diamond) | Emerging Financial Forensic Specialty: Bankruptcy, Insolvency, Reorganization (Michael Pakter) | The Reality of Hope and Change: The Outlook for the Healthcare Industry in 2013 and Beyond (Tim Smith) |
| Fields of Study | 1 Hr - SK&A | 1 Hr - SK&A | 1 Hr - SK&A | 1 Hr - SK&A | 1 Hr - MAS |
| 1:50–2:05 | Quick Break | | | | |
| 2:05–3:45 2 hours CPE | Normalization and Control Adjustments (Marc Bello) | How to Provide a Supportable Discount for Lack of Marketability (James Hitchner) | Managing the Engagement (Jeff Diamond) | Executive Compensation and Related Issues in Divorce (Hubert Klein) | Valuing Healthcare Transactions and Agreements (Jeff Moffat) |
| Fields of Study | 2 Hrs - SK&A | 2 Hrs - SK&A | 1 Hr - BL, 1 Hr - SK&A | 2 Hrs - SK&A | 2 Hrs - SK&A |
| 3:45–4:00 | Afternoon Break and Exhibits | | | | |
| 4:00–5:40 2 hours CPE | Valuation Round Tables | | Financial Forensics Round Tables | | Advanced Topics and Healthcare Valuation Forum <i>with</i> Curtis Bernstein, Chris Carnahan, Cindy Collier, Tim Smith |
| Fields of Study | <ul style="list-style-type: none"> • Managing the Engagement • Normalization Adjustments • Commercial Litigation • Supportable DLOM 2 Hrs - SK&A | | <ul style="list-style-type: none"> • Role of the Expert • Managing the Engagement • Bankruptcy, Insolvency, Reorganization • Executive Compensation in Divorce 2 Hrs - SK&A | | 2 Hrs - SK&A |
| 5:40–6:30 | Nation's Capital Opening Reception and Exhibits (see page 23) | | | | |
| 7:00–9:00 2 hours CPE | <i>Money for Nothing: Inside the Federal Reserve</i> (included in conference registration) 2 Hrs - RE | | | | |

Friday, June 7, 2013

| Time | | | | | |
|----------------------------|---|---|---|--|--|
| 6:30–8:00 | Continental Breakfast, Registration, and Exhibits | | | | |
| | Early Morning CPE | | | | |
| 7:00–7:50 1 hour CPE | You, Your Practice, and Assets are at Risk. Don't Roll the Dice with Practice Risk Management! (James Frazier, Lari Masten) | | Business Interruptions: A Primer to Policy Provisions and Loss Claims (Marcie Bour) | | |
| Fields of Study | 1 Hr - SK&A | | 1 Hr - SK&A | | |
| Session Tracks | Valuation Accelerator <small>Moderated by Rod Burkert and Mark Kucik</small> | Valuation Symposium | Financial Forensics Accelerator <small>Moderated by Rebekah Smith and Howard Zandman</small> | Financial Forensics Symposium | Mergers and Acquisitions Symposium <small>Sponsored by the MMIBA</small> |
| 8:15–9:55 2 hours CPE | Income and Asset Approach (Marc Bello) | Valuation of Earnouts and Other Contingent Liabilities (Daniel McConaughy) | Lost Profits and Damages Calculations (Nancy Fannon) | Basic Statistics and Fraud Detection— A Case Study (Pam Mantone) | Mergers & Acquisitions Post-Transaction Disputes (Karl Schwabauer) |
| Fields of Study | 1 Hr - AC, 1 Hr - SK&A | 1 Hr - FN, 1 Hr - TX | (Continued below) | 1 Hr - ST, 1 Hr - AD | 2 Hrs - SK&A |
| 9:55–10:15 | Morning Break and Exhibits | | | | |
| 10:15–11:55 2 hours CPE | Market Approach (Lari Masten) | Estimating the Cost of Capital— An Update on Current Research (Dr. Ashok Abbott, James Harrington) | Lost Profits and Damages Calculations (Continued) | Current Update in Forensic Accounting— Behavior Detection and Facial Mapping (Darrell Dorrell) | 10:15 - 11:05 The Basics of Running a Successful M&A Practice (Joe Golden, Dennis Roberts) 1 Hr - MAS 11:05 - 11:55 Combining Formal Valuation Practice, M&A Advisory Services, and the Buy Side Point of View (Mitchell Martin, Andrew Smith) 1 Hr - MAS |
| Fields of Study | 1 Hr - AC, 1 Hr - SK&A | 2 Hrs - SK&A | 1 Hr - AC, 3 Hrs - SK&A | 2 Hrs - SK&A | |
| 11:55–12:55 | Lunch On Own and Exhibits | | | | |
| 12:55–1:50 1 hour CPE | Discounts and Premiums (Robert Grossman) | Professional Ethics for Business Valuators (Alex Kindler) | Rebuttal Reports and the Defense Expert's Role (Michael Kaplan) | Techniques for Discovering "Hidden Assets" (Glenn Block) | Valuing Privately Held Businesses for Succession and Exit Planning (Willis Eayrs) |
| Fields of Study | 1 Hr - SK&A | 1 Hr - BE | 1 Hr - SK&A | 1 Hr - AD | 1 Hr - SK&A |
| 1:50–2:05 | Quick Break | | | | |
| 2:05–3:45 2 hours CPE | Synthesis of Conclusions (Chris Hamilton) | This Bumpy Economic Road: What Does It Mean for Business Valuation? (Jan Davis) | Deposition and Testimony (Michael Kaplan) | | 2:05–2:55 M&A from a Lawyer's Perspective (Andrew Sherman) 1 Hr - MAS 2:55–3:45 ATRA—Tax Reform and the Impact on M&A (Scott Miller) 1 Hr - MAS |
| Fields of Study | 2 Hrs - SK&A | 1 Hr - BM&O, 1 Hr - MAS | 1 Hr - CM, 1 Hr - SK&A | | |
| 3:45–4:00 | Afternoon Break and Exhibits | | | | |
| 4:00–5:40 2 hours CPE | Valuation Accelerator Panel Discussion | Valuation Round Tables • Valuation Earnouts • Estimating Cost of Capital • Professional Ethics • The Economy and BV | Financial Forensics Accelerator Panel Discussion | Financial Forensics Round Tables • Statistics and Fraud • Current Update in Forensic Accounting • Discovering Hidden Assets | M&A Round Tables Moderated by Dennis Roberts 2 Hrs - SK&A Business Valuation Venture Capital Forum (Lorenzo Carver) |
| Fields of Study | 2 Hrs - SK&A | 2 Hrs - SK&A | 2 Hrs - SK&A | 2 Hrs - SK&A | 2 Hrs - AD |
| 6:30 departure | Monuments by Night Tour (see page 23) | | | | |

Saturday, June 8, 2013

| Time | | | | | |
|----------------------------|---|---|---|--|---|
| 6:30–8:00 | Continental Breakfast, Registration, and Exhibits | | | | |
| | Early Morning CPE | | | | |
| 7:00–7:50 1 hour CPE | Stepping Up to True Business Ownership! Innovative and Practical Tools to Streamline Your Work Flow (Robert Jacobson, Dave Shoquist) | | | | |
| Fields of Study | 1 Hr - BM&O | | | | |
| Session Tracks | Valuation Accelerator <small>Sponsored by ValuSource and KeyValueData</small> | Financial Forensics Accelerator | Skills Development <small>Sponsored by ValuSource and KeyValueData</small> | Valuation Symposium | 2013 Tax Forum |
| 8:15–9:55 2 hours CPE | Business Valuation Report Writing Clinic (Paul Elkins, Howard Lewis, Dave Miles) | Litigation Report Writing Clinic (Dermot O'Neill, Howard Zandman) | Microsoft® Excel and Word for Valuators (David Ringstrom) | The NEW Concepts, Data, Models, and Methods from 2012/2013 That You Need to Know and Understand (James Hitchner, Mark Kucik) | Individual and Business Tax Highlights (Ron Roberson) |
| Fields of Study | | | | 2 Hrs - SK&A | |
| 9:55–10:15 | Morning Break and Exhibits | | | | |
| 10:15–11:55 2 hours CPE | Business Valuation Report Writing Clinic (Continued) | Litigation Report Writing Clinic (Continued) | Microsoft® Excel and Word for Valuators (Continued) | The Effect of Taxes on Value in Private Capital Markets (a.k.a. "S-Corps") (Nancy Fannon) | Individual and Business Tax Highlights (Continued) |
| Fields of Study | | | | 2 Hrs - SK&A | 4 Hrs - TX |
| 11:55–12:55 | Lunch On Own and Exhibits | | | | |
| 12:55–1:50 1 hour CPE | Business Valuation Report Writing Clinic (Continued) | Litigation Report Writing Clinic (Continued) | Microsoft® Excel and Word for Valuators (Continued) | 2013 Unifying Industry Standards—Bringing Everyone to the Table (Mark Hanson, Mark Kucik) | 1:00-2:50 Implementing Obamacare's Employer Provisions (Rob Roberson) |
| Fields of Study | | | | 1 Hr - RE | 2 Hrs - PHR |
| 1:50–2:05 | Quick Break | | | | 2:50-3:00 Tax Break |
| 2:05–3:45 2 hours CPE | Business Valuation Report Writing Clinic (Continued) | Litigation Report Writing Clinic (Continued) | Microsoft® Excel and Word for Valuators (Continued) | Business Valuation Reports and the IRS (Mike Gregory) | 3:00-3:50 Estate and Gift Tax Highlights (Rob Roberson) |
| Fields of Study | 2 Hrs - CM, 5 Hrs - SK&A | 2 Hrs - CM, 5 Hrs - SK&A | 7 Hrs - SK&A | 1 Hr - RE, 1 Hr - TX | 1 Hr - TX |
| 4:00–5:30 | Closing Caucus Networking Reception and Exhibitor Raffle (see page 23) | | | | |

NASBA CPE Fields of Study (FoS) Key

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| <p>AC = Accounting ACG = Accounting—Governmental AD = Auditing ADG = Auditing—Governmental AP = Administrative Practice (Consulting) SEB = Social Environment of Business RE = Regulatory Ethics BL = Business Law BM&O = Business Management and Organization FN = Finance MAS = Management Advisory Services</p> | <p>MK = Marketing BE = Behavioral Ethics CM = Communications PD = Personal Development PHR = Personnel/HR CS = Computer Science EC = Economics MM = Mathematics PRD = Production SK&A = Specialized Knowledge and Applications ST = Statistics TX = Taxes</p> |
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