

Wednesday, May 27, 2009

Time					
6:15–8:30	Continental Breakfast, Registration, and Exhibits				
6:30–8:15 2 hours CPE Fields of Study	NACVA Case Analysis Roundtable (Pre-Registration Required) 1 Hr-AC, 1 Hr-SK&A				
Session Tracks	Track One NACVA Recertification	Track Two International Valuation	Track Three Practice Management	Track Four IBA Symposium	
8:30–10:15 2 hours CPE Fields of Study	Current Update in Valuations 8 hours CPE for course: 1 Hr-AC, 1 Hr-AP, 2 Hrs-RE, 1 Hr-BM&O, 1 Hr-BE, 2 Hrs-SK&A	Conclusions from Stock Markets (AnaMaria Ciobanu) 2 Hrs-SK&A	Business Valuation Research: More, Better, Faster (Eva Lang) 2 Hrs-SK&A	No Excuses: CBA and AIBA Mentoring 2 Hrs-SK&A	
10:15–10:30	Morning Break, Registration, and Exhibits				
10:30–12:15 2 hours CPE Fields of Study	Current Update in Valuations (continued)	Update on “Fair Value” (Al King) 2 Hrs-AC	If You Change the Way You Look at Your Business, Your Business Will Change the Way You Look (Machen MacDonald) 1 Hr-BM&O, 1 Hr-MK		
12:15–1:30	Lunch on Own	IACVA Luncheon (invitation only)	Lunch on Own	Volunteer Luncheon (invitation only)	NACVA State Chapter Presidents’ Luncheon (invitation only)
1:30–3:15 2 hours CPE Fields of Study	Current Update in Valuations (continued)	1:30 - 2:25 pm Fraud Deterrence, Detection, and Investigation (Harry Cendrowski) 1 Hr-SK&A 2:25 - 3:15 pm Valuing Intellectual Property (Yea-Mow Chen) 1 Hr-SK&A	Roundtable Discussions: The Effects of the Current Economy on Valuations (Les Gosule, Ed Giardina, David Humphrey, David Goodman) 2 Hrs-SK&A	The Sale of a Business: Strategies and Techniques Used by Business Intermediaries (Jeff Jones) 1 Hr-MAS, 1 Hr-SK&A	
3:15–3:30	Afternoon Break, Registration, and Exhibits				
3:30–5:15 2 hours CPE Fields of Study	Current Update in Valuations (continued)	3:30 - 4:20 pm Session TBD 4:25 - 5:15 pm Comparative Valuation Standards (Neil Beaton) 1 Hr-AC	Financial Triage for Troubled Times® (Darrell Dorrell) 1 Hr-AP, 1 Hr-SEB	Ethics and Standards Workshop (Daniel Browning, Leo Delisi) 2 Hrs-RE	NACVA Board and Committee Meetings IBA Governors and Committee Meetings (no CPE credit)
5:15–6:30	Opening Reception, Registration, and Exhibits				

Thursday, May 28, 2009

Thursday, May 28, 2009						
Time						
7:00–7:50 1 hour CPE	Introduction to Litigation Consulting (Michael Kaplan)	Introduction to Fraud, Deterrence, Detection and Investigation (Harry Cendrowski)	Introduction to the IBA (Warren Burkholder)			
Fields of Study	1 Hr-SK&A	1 Hr-SK&A	1 Hr-SK&A			
7:00–8:00	Continental Breakfast, Registration, and Exhibits					
8:00–8:15	Opening Welcome Address					
8:15–9:55 2 hours CPE Fields of Study	Opening Keynote Address: Influence, Impact and Income—Your Recipe to Thrive in Today's Economy (Mel Abraham) 1 Hr-PD, 1 Hr-BM&O					
9:55–10:15	Morning Break and Exhibits					
Session Tracks	Track One Mainstream Valuation	Track Two Progressive Valuation	Track Three Forensic Accounting	Track Four Litigation Consulting	Track Five Academic Research	Track Six IBA Symposium
10:15–11:55 2 hours CPE	Who Says That Appraisers Agree on Everything? Burning Issues within the Appraisal Industry (Paul Hood)	The Private Cost of Capital Model (Robert Slee)	Fraud in the Financials: How and Why Auditors Fail to Find Fraud (Tracy Coenen)	Lost Profits Damages—Keeping the Expert in the Case (Nancy Fannon, Jonathan Dunitz)	Subsequent Events (Z. Christopher Mercer)	Real Estate and the Business Appraiser (Paul Hyde) <i>continues</i>
Fields of Study	1 Hr-BL, 1 Hr-SK&A	2 Hrs-FN	2 Hrs-AD	1 Hr-BL, 1 Hr-SK&A	2 Hrs-SK&A	
11:55–12:55	Conference Luncheon and Exhibits					
12:55–1:50 1 hour CPE	New Tools at Morningstar and New Research Studies (James Harrington)	The Legal Mandate for Fair Market Value: How the Anti-Kickback Statute, Stark Act, and Intermediate Sanctions Impact Financial Arrangements (Robert Wade)	Office Embezzlement: Key Operational Indicators (R. Austin Marks)	How to Determine Reasonable Certainty and Confidence Levels for the Damage Expert (C.P. "Salty" Schumann)	Quantifying Company Specific Risk Using the Finison/Dailey Model™ (Bryan Finison, Michael Dailey)	Real Estate and the Business Appraiser <i>continued</i> (Paul Hyde) 3 hours CPE for entire session
Fields of Study	1 Hr-AC	1 Hr-BL	1 Hr-AD	1 Hr-FN	1 Hr-FN	2 Hrs-AC, 1 Hr-EC
1:50–2:05	Afternoon Break and Exhibits					
2:05–3:45 2 hours CPE	New Formulas for Terminal Value That Overcome the WACC Problem (Mike Adhikari)	International Financial Reporting Standards—Here They Come (William Menchero, Deborah Jackson, Remi Forgeas, David Elsbree)	Identity Theft—Risk Assessment in a Business Environment (Patricia Perzel)	Calculating and Proving Damages for Patent Claims—Understanding <i>Panduit, Georgia Pacific, Grain Processing</i> , and Other Key Cases (Bruce Dubinsky)	Firm-Specific Risk Adjustment of Public Companies Multiples (Daniel McConaughy, Vincent Covrig)	Tax Valuation in a Changing Environment (Hon. David Laro, Howard Lewis, Michael Eggers)
Fields of Study	1 Hr-AC, 1 Hr-FN	2 Hrs-AC	1 Hr-AD, 1 Hr-BM&O	2 Hrs-SK&A	1 Hr-AC, 1 Hr-FN	1 Hr-RE, 1 Hr-TX
3:45–4:00	Afternoon Break and Exhibits					
4:00–5:40 2 hours CPE	Determining the Cost of Capital—Practical Application and Reconciliation of Ibbotson and Duff & Phelps Data (Jim Hitchner)	Marketability Discounts: We Can Now Reconcile Differing Approaches and Methods (Z. Christopher Mercer)	Interviewing Skills for the Forensic Accountant (Paul Zikmund)	An Expert's Guide to Avoiding Disasters in Litigation (Michael Kaplan, Stephen Erigero)	A Compensation-Based Method of Valuing Small Closely Held Businesses (Michael Elmaleh)	<i>Daubert</i> Challenges: What Every Appraiser Needs to Know (Michael Costello)
Fields of Study	2 Hrs-SK&A	2 Hrs-FN	1 Hr-PD, 1 Hr-SK&A	2 Hrs-SK&A	1 Hr-AC, 1 Hr-BM&O	2 Hrs-SK&A
5:40–6:30	Networking Reception and Exhibits					

Friday, May 29, 2009

Time						
7:00–7:50 1 hour CPE Fields of Study	Introduction to Family Law (Karen Kaseno) 1 Hr-SK&A	Introduction to Forensic Accounting (Darrell Dorrell) 1 Hr-SK&A	IBA Overview of the CBA and ABAR Designations (Frank Rosillo) 1 Hr-SK&A			
7:00–8:15 Continental Breakfast, Registration, and Exhibits						
8:15–9:55 Closing Keynote Address: Governance, Ethics, and Accountability (Dr. Sridhar Ramamoorti) 1 Hr-RE, 1 Hr-SEB 2 hours CPE Fields of Study						
9:55–10:15 Morning Break and Exhibits						
Session Tracks	Track One Mainstream Valuation	Track Two Progressive Valuation	Track Three Forensic Accounting	Track Four Litigation Consulting	Track Five Academic Research	Track Six IBA Symposium
10:15–11:55 2 hours CPE Fields of Study	Discount for Lack of Marketability (Liquidity) Models: A Comparative Analysis (Ashok Abbott) 1 Hr-FN, 1 Hr-EC	Cost of Capital for Distressed Companies (Roger Grabowski) 2 Hrs-FN	The “Big 3” Forensic Accounting Methodologies (Darrell Dorrell) 2 Hrs-AC	Mock Deposition for a Business Valuation Engagement (Robert Vance, Miles Mason Sr., Brent McDade) 2 Hrs-SK&A	DLOM: Using BIZCOMPS Transactional Database to Support Discounts (Carl Sheeler, Mike Long, Jim DiGabriele) 2 Hrs-SK&A	Forensic Business Appraisals: Overcoming Hurdles in Seeking Critical Documents and Information and Reconstructing Business Income in Financial Litigation (Richard Wise) 2 Hrs-SK&A
11:55–12:55 Conference Luncheon and Exhibits						
12:55–1:50 1 hour CPE Fields of Study	Case Law Update (Brandi Ruffalo) 1 Hr-SK&A					Intellectual Property Economic Damages Analysis (Robert Reilly) <i>continues</i>
1:50–2:05 Afternoon Break and Exhibits						
2:05–3:45 2 hours CPE Fields of Study	Positive and Negative Indicators: Quantifying Your Ratio Analysis and Its Effect on Compliance Valuations (Lari Masten) 2 Hrs-SK&A	Five Mistakes Your Auditor Made—How Valuation Professionals Can Overcome Inaccurate Warrant and Option Proceed Allocations as Determined by Auditors and Other Parties Reviewing Their Work (Lorenzo Carver) 2 Hrs-AD	Complex Financial Issues in Divorce (Karen Kaseno) 2 Hrs-SK&A	Tricks and Traps in the Valuation of Medical Practices, Compensation, Local Markets, and Cap Rates (Mark Dietrich) 2 Hrs-SK&A	Goodwill Impairment Testing under SFAS 142: An Examination of Management Reporting Decisions (Feng Gu) 1 Hr-AC, 1 Hr-FN	Intellectual Property Economic Damages Analysis (Robert Reilly) <i>continued</i> 3 hours CPE for entire session 3 Hrs-SK&A
3:45–4:00 Afternoon Break and Exhibits						
4:00–5:40 2 hours CPE Fields of Study	Square Pegs in Round Holes: Adjusting Multiples from Public Guidelines for Private Firms (Don Drysdale) 2 Hrs-SK&A	The Butler-Pinkerton Model™: Beyond the Basics (Peter Butler, Keith Pinkerton) 2 Hrs-SK&A	The Forensic Accountant’s Role in Criminal Cases (James Schaffner) 2 Hrs-SK&A	The Critical Interplay between Valuators, Their Clients, and Other Professionals in the Collaborative Divorce Process (Linda Piff, Lauren Alexander) 2 Hrs-SK&A	Case Study for Application of Longstaff Model for Marketability Discounts for Private Companies (Marc Vianello) 2 Hrs-SK&A	Impact of Guaranteed Debt (Brent McDade) 1 Hr-AC, 1 Hr-SK&A
5:40–6:30 Networking Reception and Exhibitor Raffle						

Saturday, May 30, 2009

Time				
7:30–8:30	Registration and Continental Breakfast			
	NACVA		IBA Symposium	Proctored Exams
8:30–10:15 2 hours CPE	Industry Standards Update (Mark Kucik, Mark Hanson, Standards Committee)		Standards of Value: When Should Fair Value Replace Fair Market Value? (Marc Bello)	Beginning at 8:00 am CVA/AVA Proctored Exam (5 hours) CFFA Proctored Exam (2, 4, or 6 hours) CMAP Proctored Exam (4 hours)
Fields of Study	1 Hr-AP, 1 Hr-RE		2 Hrs-SK&A	
10:15–10:30	Morning Break			
10:30–11:30 1 hour CPE	ValuSource			Trends in Valuation: An Experts Panel Discussion (Jeff Jones, Rand Curtiss, Robert Schlegel, Frank Rosillo) 2 hours CPE 1 Hr-AC, 1 Hr-SK&A
	Public Company Data Plus the Guideline Analyzer: Solving the Challenges of a Public Company Comparable Search	IBA Market Data (Now available without IBA membership): Understanding and Using the Largest Transaction Database for Privately Held Business Sales	Medical Practice Benchmarking for Valuators: Understanding and Using the MGMA Survey Data and Benchmarking Tools to Determine Fair Compensation and Perform Financial Statement Benchmarks	
Fields of Study	1 Hr-SK&A	1 Hr-SK&A	1 Hr-SK&A	CBA AIBA ABAR Proctored Exams (continued)
11:40–12:40 1 hour CPE	Public Company Data Plus the Guideline Analyzer: Solving the Chal- lenges of a Public Company Com- parable Search (REPEAT)	IBA Market Data (Now available without IBA membership): Understanding and Using the Largest Transaction Data- base for Privately Held Business Sales (REPEAT)	Medical Practice Benchmarking for Valuators: Understanding and Using the MGMA Survey Data and Benchmarking Tools to Determine Fair Compensation and Perform Financial Statement Benchmarks (REPEAT)	
Fields of Study	1 Hr-SK&A	1 Hr-SK&A	1 Hr-SK&A	
12:40	Conference Concludes			

NASBA CPE Fields of Study (FoS) Key

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