You have to admit it. Right before our eyes nearly every aspect of our lives is rapidly evolving, so much so that it is difficult to keep up. This rapid evolution presents opportunities for us to examine where we have come from, assess where we want to go, and redefine ourselves as professionals to set new levels of achievement—while also keeping in step with the world as change unfolds.

“We are entering a period of fundamental reinvention on a scale seen only a handful of times in history.”

Peter Leyden
Founder and CEO, Reinvent, and NACVA/CTI’s 2017 Annual Conference Keynote Speaker

Having spent the past quarter century pioneering the business valuation and financial litigation profession, NACVA and the CTI are now keenly focused on the future—concentrating the Association’s efforts and initiatives to ensure continued success and growth for the profession.

This year’s Conference will feature established experts and emerging trailblazers from within the profession, and also from the outside, who will address key areas where there are emerging opportunities to:

- **redefine** who you are in the profession and in your practice,
- **leverage** your business valuation and financial litigation expertise to enhance your value as a full service business consultant to your clients,
- **embrace** the strengths and benefits of intergenerational collaboration in your workplace,
- **expand** your knowledge and exposure to emerging areas of practice and standards in the global marketplace, and
- **master** technology to increase your productivity and your bottom line.

Join us in Chicago! Solutions will be presented. Discourse will be encouraged. Like never before, the future presents a wide array of opportunities for us to reinvigorate our lives and redefine our careers and the profession.
Swissôtel Chicago, designed by renowned Chicago architect Harry Weese, is an award winning, four-diamond, all-glass triangular luxury hotel. Ideally situated in the confluence of the Chicago River and Lake Michigan and just steps away from exclusive shopping on The Magnificent Mile in downtown Chicago, with fabulous wrap-around views from Navy Pier to Millennium Park. Swissôtel Chicago offers an exclusive setting with one of the city’s most prestigious addresses.

Swissôtel Chicago
323 East Upper Wacker Dr., Chicago, IL 60601
CTI Group Rate: $249 single/double*
Expires: May 12, 2017
Reservations:
www.AnnualConsultantsConference.com
Reservation Line: (888) 737-9477
Hotel Phone: (312) 565-0565
O’Hare Int. Airport: 18 miles to hotel
Midway Int. Airport: 13 miles to hotel

Travel Services
Call Sue Ellen at (800) 355-3644
Relax! Let NACVA Travel Services remove the stress and handle your arrangements for Chicago. They’re good at it—they’ve been doing it for over 30 years. NACVA Travel Services is dedicated to finding the very best combination of service and convenience available at any given time. They’ll save you time and, because they know the ins and outs of the travel business, will often be able to save you money.

Spouses and Guests
 Invite your spouse/guest to attend the Conference networking functions, including continental breakfasts, AM and PM breaks, luncheons, and receptions ($350 per person).

See Inside Back Cover for Registration Fees and Discounts

* Group room rates not guaranteed. Book as soon as possible as rooms are available on a first come, first served basis.
Opening Keynote Address

The Reinvention of America
Peter Leyden, Innovator and Entrepreneur

Thursday, June 8 | 8:10 a.m. – 9:50 a.m. .Broadcast Live

America is entering a period of fundamental reinvention on a scale seen only a handful of times in its history. Mr. Leyden makes the case that we are about to enter 10 to 20 years of explosive innovation across many fields, from energy to education to government. He lays out the changes to look for as we abandon many of the systems of the 20th century and rebuild systems that will work in the emerging all-digital, fully global, more sustainable 21st century world. He explains the ramifications on the economy, society, and civic life, as well as on all businesses and organizations. Mr. Leyden makes analogies to previous periods when America has faced similar deep structural changes and unprecedented challenges, and transformed itself through bursts of widespread innovation. His positive story of how Americans will once again transform our way of life and lead the rest of the world leaves people of all political persuasions inspired.

Peter Leyden is a leading expert on new technologies and trends shaping the future who frequently gives keynote talks about what is next. Mr. Leyden worked for a series of innovative organizations that helped reinvent the fields of media, business, and politics: he was managing editor at the original Wired magazine that introduced the world to the digital revolution. He worked at Global Business Network, the pioneering think tank helping corporations plan for the future. He was founding director of the New Politics Institute that helped those in Washington transition to politics on the Internet. Mr. Leyden currently is founder and CEO of Reinvent, a network of innovators using the new medium of group video to carry out a series of conversations about how to reinvent America. Before that, he was founder and CEO of Next Agenda, a new media startup specializing in advancing big ideas through web video. Mr. Leyden started his career as a journalist, including serving as a special correspondent for Newsweek magazine in Asia. He is the co-author of two books on new technologies and the future: The Long Boom and What’s Next.
The official role of the valuation or financial litigation expert is to assist the trier of fact in interpreting and understanding the financial evidence. Many experts, however, are blindsided in the courtroom when they find out that their professional opinions are laden with landmines in the form of unverified evidence, unreasonable assumptions, risky leaps of faith, inappropriate protocol, and inadvertent departures from professional standards. In this session, Judges Gonzalez, Platt, and Yates will share the challenges that they have encountered with financial professionals and offer guidelines and approaches to solidify our opinions and persuasiveness in the legal environment.

Michael G. Kaplan, CPA, ABV, CFF, CVA, MAFF (moderator)
Kaplan Forensics

Honorable Judge
Elizabeth Gonzalez
District Court of
Clark County of 8th
Judicial District

Judge Elizabeth Gonzalez is the Presiding Judge of the Civil Division of District Court, handling business, civil, and criminal cases. She was appointed to the district court in July 2004. Prior to taking the bench, she practiced predominantly in complex civil litigation that included business, mass tort, and construction defect litigation. Judge Gonzalez currently is the President of the American College of Business Court Judges. She previously served on the Judicial Council of the State of Nevada, Supreme Court Jury Improvement Commission, the Supreme Court Access to Justice Commission, and the State of Nevada Ethics Commission. Judge Gonzalez has given numerous seminars on business and construction defect litigation including the subjects of evidence, civil discovery, insurance issues, dispute resolution, and construction defect issues.

Honorable Judge
Steven I. Platt (Ret.)
The Platt Group, Inc.

Judge Steven I. Platt (Ret.) retired as a full-time Circuit Court Judge in Maryland on January 15, 2007. He has since been approved by the Court of Appeals to be recalled in all eight Circuits and the Court of Special Appeals to try cases and conduct settlement conferences as a recalled judge. He is also engaged in private mediation, arbitration, and neutral case evaluation of complex civil litigation, including: medical malpractice cases, legal malpractice cases, product liability cases, construction litigation, and business disputes. Judge Platt is a trained mediator having completed the basic 40-hour course, as well as advanced courses. He serves as a panel arbitrator and mediator for the American Arbitration Association (AAA), International Institute for Conflict Prevention and Resolution (CPR), Resolute Systems (RS), and Financial Industry Regulatory Authority (FINRA), as well as his own company, The Platt Group, Inc.

Honorable Judge
Christopher P. Yates
Circuit Court the
17th Judicial Circuit
of Kent County

Judge Christopher Yates was appointed to the Kent County (Michigan) Circuit Court on April 22, 2008. He has served in both the Criminal/Civil Division and the Family Division of that court. He currently runs the specialized business docket for the court. Judge Yates received a BA from Kalamazoo College in 1983, and a JD and an MBA from the University of Illinois in 1987. As an attorney, Judge Yates served as a law clerk to a federal trial-court judge and a federal appellate judge, as a federal prosecutor in Detroit, as an attorney-advisor in the Office of Legal Counsel at the U.S. Department of Justice in Washington, as Chief Federal Public Defender for the Western District of Michigan, and as a partner in two private law firms.
It’s impossible to be at every session; *Around the Valuation World* is a great way to catch up on what you might have missed.

Presented in a one-hour format, this session will be held each morning of Conference from Thursday through Saturday, and you will earn valuable CPE (No CPE for YouTube broadcast). These sessions will be conducted by subject matter experts who summarize the training tracks and sessions from the previous day to keep you current on all the Conference happenings.

**Thursday, June 8**
7:00–7:50 a.m.
Highlights from the 2017 Current Update in Valuations Symposium and the Litigation Report Writing Workshop

**Friday, June 9**
7:00–7:50 a.m.
Highlights from Day One (Thursday, June 8) of the 2017 Annual Consultants’ Conference

**Saturday, June 10**
7:00–7:50 a.m.
Highlights from Day Two (Friday, June 9) of the 2017 Annual Consultants’ Conference

**Around the Valuation World Correspondents:**
- Gregory Caruso (Editor in Chief)
- Janae Castell
- Melissa Gragg
- Brien Jones (Assistant Editor)
- Michael Gregory
- Kari Rasmussen
- Dimitri Yimga
- Alan Zipp

**Around the Valuation World Subscription:**
An annual subscription for *Around the Valuation World* is available and includes 12 webcasts and 24 hours of CPE. Webcast also qualifies for 12 bonus points toward NACVA credentialed member recertification, in addition to course CPE. (A minimum of 8 hours attendance required for 12 bonus points.) To register, call Member/Client Services at (800) 677-2009, or visit www.AroundtheValuationWorld.com.

**Annual Subscription Cost:**
- $355 (NACVA Member)
- $395 (Non-Member)
Wednesday, June 7, 2017

6:15–8:30 a.m.  
REGISTRATION AND CONTINENTAL BREAKFAST

6:30–8:15 a.m.  
2 Hrs CPE
Business Valuation Report Peer Review—Case Analysis in Person (CAP) Round Tables  
(Additional Registration Fee Required)

7:00–7:50 a.m.  
1 Hr CPE
Industry Standards Update
Mark Hanson, Mark Kucik, Carl Steffen

8:30–10:15 a.m.  
2 Hrs CPE
SESSON TRACKS
Current Update in Valuations (CUV)  
Pre-Conference Symposium  
(Additional Registration Fee Required)

10:15–10:30 a.m.  
MORNING BREAK, REGISTRATION, AND EXHIBITS

10:30 a.m.–12:15 p.m.  
2 Hrs CPE
Federal and State Case Law Update  
Peter Agrapides, Melissa Gragg

12:15–1:30 p.m.  
LUNCH ON OWN, REGISTRATION, AND EXHIBITS

1:30–3:15 p.m.  
2 Hrs CPE
“Double Dip” again...and again...and again—Bringing Clarity to this Complex Issue
Panel: Marc Bello, Robert Grossman, Garth Tebay, Courtney Sparks White

3:15–5:15 p.m.  
2 Hrs CPE
Daubert Update
Panel: Marc Bello, Robert Grossman, Garth Tebay, Courtney Sparks White

5:15–6:15 p.m.  
WINDY CITY OPENING RECEPTION

6:15–11:00 p.m.  
SUNSET DINNER CRUISE  
(prior ticket purchase required)

6:15–11:00 p.m.  
DINE-AROUNDS

For session details and faculty bios, visit www.AnnualConsultantsConference.com.
**Thursday, June 8, 2017**

<table>
<thead>
<tr>
<th>Time</th>
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<td>6:30–8:00 a.m.</td>
<td><strong>REGISTRATION, CONTINENTAL BREAKFAST, AND EXHIBITS</strong></td>
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<tr>
<td>7:00–7:50 a.m.</td>
<td>1 Hr CPE, Around the Valuation World Morning Show</td>
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<tr>
<td>8:10–9:50 a.m.</td>
<td>2 Hrs CPE, Around the Valuation World Correspondents</td>
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<tr>
<td>9:50–10:10 a.m.</td>
<td>KEYNOTE: The Reinvention of America</td>
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<tr>
<td>10:10–11:50 a.m.</td>
<td>2 Hrs CPE, Business Valuation and Financial Litigation — How to Do It: From Foundations to Advanced</td>
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<tr>
<td>11:50 a.m.–12:50 p.m.</td>
<td><strong>NETWORKING LUNCHEON AND EXHIBITS</strong></td>
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<tr>
<td>12:50–1:40 p.m.</td>
<td>1 Hr CPE, Financial Statements — Written Confessions</td>
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<tr>
<td>1:40–2:00 p.m.</td>
<td><strong>QUICK BREAK AND EXHIBITS</strong></td>
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<tr>
<td>2:00–3:40 p.m.</td>
<td>2 Hrs CPE, Divorce Valuations — Who Owns the Personal Goodwill?</td>
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<tr>
<td>3:40–4:00 p.m.</td>
<td><strong>AFTERNOON BREAK AND EXHIBITS</strong></td>
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<td>4:00–4:50 p.m.</td>
<td>1 Hr CPE, The Expert’s Role in Financial Litigation — Real-World Guidance for Managing the Engagement</td>
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<td>4:50–5:10 p.m.</td>
<td><strong>SESSION RESET</strong></td>
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<td>5:10–6:00 p.m.</td>
<td>1 Hr CPE, Hardball with Hitchner — Solid Answers to Your Tough Questions</td>
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<tr>
<td>6:00–7:00 p.m.</td>
<td><strong>HAPPY HOUR AND EXHIBITS</strong></td>
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<tr>
<td>6:00–11:00 p.m.</td>
<td>CUBS BASEBALL GAME / ART INSTITUTE (both require prior ticket purchase)</td>
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<tr>
<td>7:00–11:00 p.m.</td>
<td>DINE-AROUNDS</td>
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### Friday, June 9, 2017

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>6:30–8:00 a.m.</td>
<td>Registration, Continental Breakfast, and Exhibits</td>
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<tr>
<td>7:00–7:50 a.m.</td>
<td>1 Hr CPE</td>
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<tr>
<td>8:10–9:50 a.m.</td>
<td>2 Hrs CPE</td>
</tr>
<tr>
<td>9:50–10:10 a.m.</td>
<td><strong>MORNING BREAK AND EXHIBITS</strong></td>
</tr>
<tr>
<td>10:10–11:10 a.m.</td>
<td>SESSION TRACKS</td>
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<tr>
<td>11:10–12:10 a.m.</td>
<td>NETWORKING LUNCHEON AND EXHIBITS</td>
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<tr>
<td>12:50–1:40 p.m.</td>
<td>1 Hr CPE</td>
</tr>
<tr>
<td>1:40–2:00 p.m.</td>
<td>QUICK BREAK AND EXHIBITS</td>
</tr>
<tr>
<td>2:00–3:40 p.m.</td>
<td>2 Hrs CPE</td>
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<tr>
<td>3:40–4:40 p.m.</td>
<td>AFTERTENN BREAK AND EXHIBITS</td>
</tr>
<tr>
<td>4:00–5:10 p.m.</td>
<td>1 Hr CPE</td>
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<tr>
<td>5:10–6:00 p.m.</td>
<td>1 Hr CPE</td>
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<tr>
<td>6:00–11:00 p.m.</td>
<td>DINE-AROUNDS</td>
</tr>
</tbody>
</table>

**KEYNOTE: Experts Sabotaging Themselves in Court—The Judges Tell All**

Moderated by Michael Kaplan; Panel: Honorable Judge Elizabeth Gonzalez, Honorable Judge Steven I. Platt (Ret.), Honorable Judge Christopher P. Yates
### Saturday, June 10, 2017

(Sessions included with registration)

<table>
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<tr>
<th>Time</th>
<th>Session Tracks</th>
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<tr>
<td>6:30–8:00 a.m.</td>
<td><strong>Continental Breakfast</strong></td>
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<tr>
<td>7:00–7:50 a.m.</td>
<td><strong>Around the Valuation World Morning Show</strong></td>
<td><strong>Around the Valuation World Correspondents</strong></td>
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<tr>
<td>8:00–8:50 a.m.</td>
<td><strong>Session Tracks</strong> (Co-Sponsored by ValuSource)**</td>
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<tr>
<td></td>
<td>Track One Databases and Software</td>
<td>Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp</td>
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<tr>
<td></td>
<td>RMA Valuation Edition—Enhancing Your Credibility Dave Miles</td>
<td>George Sandman</td>
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<tr>
<td>8:50–9:05 a.m.</td>
<td><strong>Beverage Refresh</strong></td>
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<tr>
<td>9:05–10:45 a.m.</td>
<td><strong>Session Tracks</strong> (Co-Sponsored by Courtroom Boot Camp)**</td>
<td>Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp (continued)</td>
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<tr>
<td></td>
<td>Track Two Business Applications, Communication, and Practice Management</td>
<td></td>
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<tr>
<td></td>
<td>Theatre Skills and Expert Witnesses Michael Kaplan, Jessie Wilson</td>
<td></td>
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<tr>
<td>10:45–11:00 a.m.</td>
<td><strong>Beverage Refresh</strong></td>
<td></td>
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<tr>
<td>11:00 a.m.–12:45 p.m.</td>
<td><strong>Session Tracks</strong> (Co-Sponsored by CoreValue®)**</td>
<td>Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp (continued)</td>
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<tr>
<td></td>
<td>Track Three Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp</td>
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<tr>
<td></td>
<td>Theatre Skills and Expert Witnesses</td>
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<tr>
<td>12:45 p.m.</td>
<td><strong>Conference Concludes</strong></td>
<td></td>
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</table>

**Concurrent Training Courses**

- **Report Writing: Review and Analysis**
  - Monday, June 5–Tuesday, June 6 (see page 19)

- **Business Valuation Certification and Training Center**
  - Certified Valuation Analyst® (CVA®) Proctored Exam
  - Monday, June 5–Saturday, June 10 (see page 18)

- **Foundations of Financial Forensics Workshop**
  - Master Analyst in Financial Forensics™ (MAFF®) Proctored Exam
  - Monday, June 5–Saturday, June 10 (see page 19)

**Seminar Cancelations:**

There is no charge to reschedule your training. Cancelations received in writing two weeks prior to the first day of the training event will be eligible for a prompt refund. A $100 administration fee will be charged for all live training event cancelations. A $150 administration fee will be charged for Annual Consultants’ Conference cancelations. If requesting a refund, any credit vouchers and/or Pacesetter® Points applied to the original purchase will be forfeited. Cancelations received less than two weeks prior to the first day of the scheduled event (and no-shows) will be issued a credit for the amount paid, which may be used toward a CTI seminar, conference, self-study course, or product sold by NACVA/CTI. Cancellation and no-show credit requests must be received no later than 90 days after an event. Any credit vouchers and/or Pacesetter Points applied to the original purchase will be added back to the purchaser’s account for future use. Credits expire five years from the date issued. There are no exceptions to this policy.

**CTI Course Cancellation Policy**

CTI reserves the right to cancel or replace topics and/or presenters if circumstances require.
Conference Faculty

AROUND THE VALUATION WORLD*
Gregory Caruso, JD, CPA, CVA
Harvest Business Advisors

Janae Castell, CVA, MAFF
Woodrum, Tate & Associates, PLLC

Melissa Gragg, CVA, CFE, MAFF, ADFA
Bridge Valuation Partners, LLC

Michael Gregory, CVA, ASA, MBA
Qualified Mediator MN Supreme Court
Michael Gregory Consulting, LLC

Brian K. Jones, Chief Operations Officer and Executive Vice President
NACVA and the CTI

Kathy Knapp, MBA, CPA, CVA
Knapp Valuation, Inc

Dimitri Yimga, MBA, CPA, CVA, CFE, CGMA
TruVim LLC

Alan Zipp, CPA, JD, ABV, CVA, CFE, CVA
Alan Zipp, CPA PC

BUSINESS APPLICATIONS, COMMUNICATION, AND PRACTICE MANAGEMENT
Colin Brown
Syncnet

Prof. Sanjay Deshmukh, PhD, CFA
DePaul University

Nathan DiNatale, CPA, ABV, CVA, ABAR
SC&H Group, LLC

Lee Frederiksen, PhD
Hinge Marketing

Michael Kaplan, CPA, ABV, CFF, MAFF, CVA
Kaplan Forensics

Stephen Kirkland, CPA, CMC, CFC, CFF
Atlantic Executive Consulting

Howard Lewis, MS, CBA, CVA, ABAR, BCA
RiskGuidance Co., LLC

Kathy Phelps
Diamond McCarthy LLP

George Sandmann
CoreValue

Jesse Wilson
Lessons from the Stage

Nancy Neal Yeend
Mediator & Dispute Management Strategist

BUSINESS VALUATION AND FINANCIAL LITIGATION—HOW TO DO IT: FROM FOUNDATIONS TO ADVANCED
R James "Jim" Alerdning, CPA, ABV, ASA, CVA, CFF
Alerding Consulting, LLC

Peter Butler, CPA, ASA
Valtrend, LLC

Jill Ellen R. Christopher
James F. Dickey College of Business Administration
Ohio Northern University

Mike Costello, CPA, ABV, CFF, CFE, ASA
Elliott Davis Decosimo

Vincent Covrig, PhD, CFA
Crowe Horwath

James Harrington, MBA
Duff & Phelps

T.J. Liles-Tims, MBA, CVA, CFE, MAFF
BVFF Partners, LLC

Bruce Johnson, ASA
MPI Business Valuations

Karen Kaseno, CPA, ABV, CFF, CFE, MAFF
The Kaseno CPA Firm, APC

Hubert Klein, CPA, ABV, CFF, CGMA, CVA, CFE
EisnerAmper, LLP

Lari Masten, MSA, CPA, ABV, CFF, CPA VA ABAR, MAFF
Masten Valuation

Daniel McConaughy, PhD, ASA
Crowe Horwath

Michael Pakter, CPA, CFE, CA, CIRA, CDBV, CFF, MAFF, CVA, CGMA
Gould & Pakter Associates, LLC

Mark Shirley, CPA, ABV, CFF, CVA, MAFF, CFE
V&L Consultants, LLP

Rebekah Smith, CPA, CVA, MAFF, CFF
GBQ Partners LLC

Garth Tebay, CPA, CVA, MAFF, CMAA
Value Defined LLC

Howard Zandman, CPA, CFF, MAFF
Habif Arogeti & Wynne LLP

Alan Zipp, CPA, JD, ABV, CVA, CBA, CFE
Alan Zipp, CPA PC

CURRENT TRENDS
Neil Beaton, CPA, ABV, CFF, CFA, ASA
Alvarez & Marsal

Michael Cheng, CPA
Financial Accounting Standards Board

Robert James Simas, MHA, ASA, MCBA, FRICS, CVA, CM&AA
Health Capital Consultants

Chris Hamilton, CPA, CVA, CFE
Arxius Financial, Inc.

Judith O’Dell, CPA, CVA
O’Dell Valuation Consulting LLC

Joseph Petrucelli, CPA, CFF, CGMA, ABV, FCPA, CVA
MAFF, PSA, CFE
Petrucelli, Piotrowski & Co., Inc.

Allie Harding Taylor
Orange Kiwi

Andrew Taylor
Orange Kiwi

Sarah von Helfenstein, MBA, CVA
Value Analytics & Design, LLC

Todd Zigrang, MBA, MHA, FACHE, ASA
Health Capital Consultants

INTERNATIONAL
Guy Sanschagrin, CPA, ABV, MBA
WTP Advisors

Dr. Thomas O’Brien, PhD
University of Connecticut

SPECIALTY AREAS OF PRACTICE
Steven Egna, CBA, CVA, ABAR, CM&AA
Valuation Resource Group, LLC

Melissa Gragg, CVA, CFE, MAFF, ADFA
Bridge Valuation Partners, LLC

Randall Kessler, Esq.
Kessler & Solomiany, LLC

Linda Nayerd, EA, MFT, CFE, CTPEA, NTPI Fellow
L A Nayerd Enterprises, Inc

Sophy Raza
Raza Jones, LLC

Jason Ruchaber, CFA, ASA
VMG Health

Shannon Shipp, MAFF
Texas Christian University

Eido Walny, JD, AEP, EPLS, TEPP
Walny Legal Group LLC

CURRENT UPDATE IN VALUATIONS PRE-CONFERENCE SYMPOSIUM
Peter Agrapidies, MBA, CVA
Western Valuation Advisors

Marc Bello, CPA, ABV, CVA, MAFF, MST
Edelstein & Company, LLP

Melissa Gragg, CVA, CFE, MAFF, ADFA
Bridge Valuation Partners, LLC

Roger J. Grabowski, FASA
Duff & Phelps, LLC

Robert Grossman, CPA, ABV, ASA, CVA, MST, CBA
Grossman, Yanak & Ford, LLP

Garth Tebay, CPA, CVA, MAFF, CMAA
Value Defined LLC

Courtney Sparks White, JD, LLM, ASA, CVA
Clarus Partners, LLC

HARDBALL WITH HITCHNER
Jim Hitchner, CPA, ABV, CFF, ASA
Financial Valuation Advisors, Inc

KEYNOTES
Honorable Judge Elizabeth Gonzalez
Presiding Judge of the Civil Division of District Court
District Court of Clark County of 8th Judicial District

Michael Kaplan, CPA, ABV, CFF, CVA, MAFF
Kaplan Forensics

Peter Leyden
Reinvent

Honorable Judge Steven I. Platt (Ret.)
The Platt Group, Inc.

Honorable Judge Christopher P. Yates
Business Court Judge
Circuit Court the 17th Judicial Circuit of Kent Co

LITIGATION REPORT WRITING WORKSHOP
Howard Zandman, CPA, CFF, MAFF
Habif Arogeti & Wynne LLP

DATABASES AND SOFTWARE
Jeff Harwell, CVA, MAFF, CMEA
Harwell & Company

Dave Miles, CPA, CVA, CGMA
ValuSource

Frank Wishehart, MBA, CPA, ABV, CFE, CVA
RGL Forensics
Windy City Opening Reception

**Wednesday, June 7 | 5:15 p.m. - 6:15 p.m.**

Rekindle established relationships and cultivate new ones! The Windy City Opening Reception will feature hors d’oeuvres, bar drinks, entertainment, and an opportunity to network with Conference attendees and exhibitors—the perfect way to kick off the business valuation and financial litigation industry’s Annual Conference in Chicago.

Happy Hour and Exhibits

**Thursday, June 8 | 6:00 p.m. - 7:00 p.m.**

Grab a cocktail and network before heading out for the evening activities.

Networking Luncheons and Exhibits

**Thursday, June 8 | 11:50 a.m. - 12:50 p.m.**  
**Friday, June 9 | 11:50 a.m. - 12:50 p.m.**

Past Conference attendees cite the exhibits as one of their Conference highlights. Network and meet face-to-face with the providers of the industry’s latest tools and resources.

Meet, Greet, and Catch Some Fish!

**Tuesday, June 6   Co-Sponsored by ValuSource**

Need a fishing break between the office and Conference? Join us on Lake Michigan for an opportunity to network and catch some salmon and trout. We will leave Tuesday morning, June 6, accompanying a local professional fishing guide for six hours. We have the boats, the gear, and the tackle, just bring yourself. **ValuSource is subsidizing the trip;** you pay only **$75.00** for the charter, and **$15.00** for Illinois residents and **$17** for non-residents for your fishing license. Transportation to and from the hotel is included. More information is available at [www.valusource.com/ctifishing](http://www.valusource.com/ctifishing). Space is limited to 20 people, so reserve your spot early.

Set Sail and Forget Your Worries!

**Wednesday, June 7 | $104/ticket | 6:15 p.m. Departure | 6:30 p.m. Boarding**

Experience a beautiful three-hour sunset dinner cruise along the Lake Michigan shoreline. Departing from Navy Pier, you will enjoy the panoramic views of the beloved Chicago skyline including the iconic Windy City sights of Willis (Sears) Tower, Buckingham Fountain, and Soldier Field. Savor the Spirit’s delicious all-you-can-eat buffet-style meal while listening to a live DJ. The evening will conclude with dancing and a spectacular view of fireworks on the upper deck. Space is limited, so be sure to reserve your spot today!
A Night in the Museum

Thursday, June 8 | $35/ticket | 6:15 p.m. Departure | 6:30 p.m. Tour

Revel in the magnificence of Chicago's Art Institute. Whether you take the time to appreciate the architecture of the museum itself, or the many wonders inside, this will be the perfect time to indulge your inner artist. A private guide will take our group through the halls of artist greats such as Claude Monet, Van Gogh, and Pierre-Auguste Renoir. We will study artifacts ranging from the Ming Dynasty to the Middle Ages. If modern abstract art is more your taste, then you will appreciate the new gallery Abstract Experiments: Latin American Art on Paper after 1950. No matter which piece of art is your favorite, you will find that the Art Institute is considered one of the best for a reason.

It’s a Beautiful Night for a Ballgame

Thursday, June 8 | $68/ticket | 6:15 p.m. Departure | 7:00 p.m. Game Time

Despite the rain and a 71-year old curse, the Chicago Cubs beat the odds and won the 2016 World Series. Now you can take an evening to enjoy a historic team playing in the historic Wrigley Field stadium. Grab a Craft Sausage from Gilbert’s or a slice of Giordano’s pizza along with a cold beverage, sit back, and share in the excitement while the Cubs take on the Colorado Rockies. Go, Cubs, Go!

Chicago Dine-Arounds

Wednesday, June 7
6:15 p.m.–11:00 p.m.

Thursday, June 8
7:00 p.m.–11:00 p.m.

Friday, June 9
6:00 p.m.–11:00 p.m.

After a full day of Conference attendance, meet up with other attendees while discovering some of the wonderful cuisine Chicago has to offer. Each group will be "hosted" by NACVA and CTI presenters and board members (dinner costs on-own). More information will be available as Conference approaches.
You’ve earned a valuation or financial litigation credential...

Now What?

NACVA’s New Member Network™ (NMN) provides the forum for newly minted credentialed members and experienced practitioners to share experiences and challenges, exchange ideas and best practices, and build long lasting professional relationships.

The 2017 Annual Consultants’ Conference features several opportunities for you to build your skills, gain confidence, and expand your networks.

Current Update in Valuations Pre-Conference Symposium

Get up to date on the trends, theory, approaches, and case law impacting the profession. The symposium is Wednesday, June 7. See page 17 for complete details and additional fees.

Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp

Leverage your certification to expand your practice as a full-service business consultant on Saturday, June 10 from 8:00 a.m. to 12:45 p.m. See page 10 for complete details.

Hardball with Hitchner—Solid Answers to Your Tough Questions

Bring your toughest issues to this lively interactive panel/participant discussion and receive timely insights and practical guidance from the nation’s leading experts and emerging leaders. This exciting session will be held on Thursday, June 8 and Friday, June 9 from 5:10 p.m. to 6:00 p.m. each day. See page 16 for details and to submit your questions.

Preparing the Younger Generation

Embrace the strengths and benefits of intergenerational collaboration in your workplace at this session on Thursday, June 8 from 4:00 p.m. to 4:50 p.m. See page 8 for details.

Mentor and Mingle

We have planned several Chicago themed events for first time attendees, new, and longtime members to establish friendships and rekindle old ones. Sign up for these events today!

Experience Chicago events will include a dinner cruise, a trip to a Chicago Cubs baseball game, a tour of the Chicago Art Institute, a fishing expedition, and evening dine-arounds. Conference will also host several receptions and networking luncheons included with the cost of registration. See pages 12 and 13 for details and associated costs.
### Purchase a Database à la Carte or Bundle and Save

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#### TOTAL BUNDLE VALUE

- **$245**
- **$640**
- **$1,159**
- **$2,405**
- **$5,184**

#### ACTUAL BUNDLE COSTS

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*See website for details, conditions, and upgrading to unlimited BIZCOMPS.*
Hardball with Hitchner—
Solid Answers to Your Tough Questions
(included with registration)

**Thursday, June 8 | Friday, June 9**
5:10 p.m.–6:00 p.m.
*(Jim Hitchner and Panelists)*

You ask the tough questions. Industry titan, Jim Hitchner, will moderate a panel of our Conference faculty who will provide solid answers. In this lively and interactive discussion, the profession’s leading experts and emerging leaders will share their insights and practical guidance on a range of topics, including: the current issues surrounding discount rates and growth rates, malpractice litigation, professional standards, DLOMs, control premiums, minority discounts, how to excel in financial litigation and expert witnessing, emerging industries, best practices and common mistakes to avoid, generational differences in the workplace, and much more. Receive cutting-edge information on an array of topics and walk away with answers to your burning questions. Go to www.HardballwithHitchner.com to submit questions for the panel.

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**Business Valuation Report Peer Review—Case Analysis in Person (CAP)**

**Wednesday, June 7**
6:30 a.m.–8:15 a.m.

**Business Valuation**

Knowledge is acquired in three ways: education, experience, and interaction. Attendees in this course are on pre-assigned round tables to review and discuss actual valuations. Through this process, you will learn from others’ experience and group interaction. Attendees are given a report before the course that must be reviewed prior.

---

**Additional Registration Fee—**
Members: $225/Non-Members: $250. Early Registration or Multiple-attendee discounts do not apply. This course qualifies for 12 bonus points toward NACVA-credentialed member recertification, in addition to course CPE. To learn more, visit www.theCTI.com/CAP
Current Update in Valuations (CUV) Pre-Conference Symposium

Additional Registration Fee—Members: $540/Non-Members: $600. Early Registration or Multiple-attendee discounts do not apply. This symposium qualifies for 12 bonus points toward NACVA-credentialed member recertification, in addition to course CPE. Join this symposium of the finest subject matter experts as they collaborate to deliver training and tools that will assist you in producing a strong, defensible work product that will lead to increased confidence in your opinions.

**Wednesday, June 7**

**8:30 a.m.–10:15 a.m.**

**Business Valuation**

(Roger Grabowski)

**KEYNOTE: Cost of Capital—Current Controversies and New Research**

Shannon Pratt and Roger Grabowski have begun work on the upcoming Cost of Capital: Applications and Examples 6th Edition, and have identified a number of controversies they will be addressing and presenting research they believe readers of the book will find interesting. This session is a prelude to the upcoming edition, highlighting some of the more important issues and research that will appear in the book.

**10:30 a.m.–12:15 p.m.**

**Business Valuation**

(Peter Agrapides, Melissa Gragg)

**Federal and State Case Law Update**

Numerous court cases have furnished guidance on tax valuation issues and assistance with navigating the numerous minefields. State-level valuation case law should be of interest to any practitioner in the litigation support arena. This practical review of court cases and valuation issues deals with various types of clients and situations, providing guidance in resolving valuation issues and maintaining compliance with tax code, regulations, and court decisions.

**3:30 p.m.–5:15 p.m.**

**Business Valuation**

(Panel: Marc Bello, Robert Grossman, Garth Tebay, Courtney Sparks White)

**Daubert Update**

There was an overwhelming number of cases in 2016 dealing with Daubert challenges and experts running up against the rules of evidence. The panel will review these cases which criticized our profession for unreliable work, bias, and advocacy. After many years of Daubert, the cases from 2016 provide insight into how the courts address such challenges and how our industry may be failing to provide reliable conclusions. This session will be an interactive approach to case law interpretation and how the outcomes could have been different. The panel will also review publications issued in 2016 dealing with the Daubert issue, including one authored by Judge Laro.

CUV is available either live or as an online broadcast!
Program Description
Understanding and applying the generally accepted business valuation methodologies and approaches, and adhering to professional standards that govern the business valuation profession, will put you in a stronger position to better serve your clients.

Gain credibility in the business community and demonstrate competency to the courts by achieving a certification in business valuation.

The Business Valuation Certification and Training Center (BVTC), offered live in cities throughout the U.S., live online, or through self-study, delivers the most comprehensive and complete foundational training, teaching to the body of knowledge on how to value private business enterprises. The training prepares attendees to pass any business valuation certification exam offered in the profession; particularly the CVA designation offered by NACVA.

What You Will Cover

Days 1 and 2: Business Valuations—Fundamentals, Techniques & Theory (FT&T)

Day 3: Business Valuations—Applications and Calculations of the Income and Asset Approaches

Day 4: The Market Approach—Exploring the Pricing Component

Day 5: Valuation in Action—Case Studies: Applying the Principles and Techniques

Post Training
Live, Online Seven-Part Webinar Series—Online CVA Case Study Report Writing Clinic

Non-Member Package Pricing (Before Early Registration Discount)

| Days 1 and 2: Business Valuations (BV)—Fundamentals, Techniques & Theory | $1,200 |
| Day 3: BV—Applications and Calculations of the Income and Asset Approaches | $600 |
| Day 4: The Market Approach—Exploring the Pricing Component | $600 |
| Day 5: Valuation in Action—Case Studies: Applying the Principles and Techniques | $600 |
| First-year NACVA Membership (Practitioner) | $495 |
| CVA Certification Exam | $595 |
| Total Retail Cost for Five-day BVTC | $4,090 |

PACKAGE PRICE | $3,490
Package Price after 10% Early Registration Discount | $3,141

Early Registration Discounts: Register and pay by March 31, 2017, and receive a 10% discount. Register and pay by April 30, 2017, and receive a 5% discount.
Concurrent Training Courses

Foundations of Financial Forensics Workshop

To learn more, visit www.theCTI.com/FFF

June 5–10

Additional Registration Fee—Members: $2,700/Non-Members: $3,000. MAFF certification exam fee: $595 for Members and Non-Members. Package option, which includes a discount on the MAFF certification exam, is also available. Early Registration discounts available. Multiple-attendee discounts do not apply.

Unlike most financial forensics training that tends to be general in scope, the Foundations of Financial Forensics Workshop provides attendees with an understanding of the professional responsibilities and legal underpinnings necessary to providing credible financial forensics services along with an overview of the highest growth areas of financial forensics practice. The nationally recognized and seasoned financial forensic experts who teach the program also dive into the methodologies and approaches for calculating damages, financial investigative and forensic accounting techniques, skills development for communicating with judges, attorneys, and juries, and practice building strategies that are being employed by successful and emerging financial forensic analysts. Training and certification in this field will greatly assist CPAs and other financial experts to build their practice in this rapidly growing financial consulting niche. The workshop teaches to the body of knowledge for financial forensics and prepares attendees to achieve the Master Analyst in Financial Forensics™ (MAFF®) credential. The MAFF certification exam will be administered on Saturday, June 10, following the five-day workshop. MAFF candidates can fulfill the foundational experience prerequisite with attendance at this workshop.

Forensic Accounting Academy™

To learn more, visit www.theCTI.com/FAA

June 5–7

Additional Registration Fee—Members: $1,620/Non-Members: $1,800. Early registration discounts available. Multiple-attendee discounts do not apply.

Despite the chronic and compelling need for financial forensics and forensic accounting expertise, the accounting and financial professions have yet to embrace or even offer a cogent and comprehensive forensic accounting tools-based methodology. That deficiency has plagued our economy...until now. The Forensic Accounting Academy™ (Academy) is the most all-inclusive training in forensic accounting available to date. The intensive and hands-on, four-day Academy provides a one-stop source of 300+ tools, techniques, methods, and methodologies applicable to virtually any large or small financial matter, whether civil, criminal, or dispute, and defines the financial forensics/forensic accounting profession: “The Art & Science of Investigating People & Money®.”

The Academy content is designed for both financial and non-financial professionals who require sophisticated investigative and analytical skills to stay abreast of increasing civil and criminal wrongdoing treachery. Advanced skills are essential as people and money resources diminish. Those who complete the Academy become qualified as Forensic Operators®—financial forensics-capable personnel who possess unique and specific skills, knowledge, experience, education, training, and integrity beyond the mere financial realm.

The Academy centers around the Forensic Accounting Investigation Methodology© (FAIM®), a proprietary Internet-based hyperlinked methodology which delivers immediately useable and practical skills—NOT theory—that attendees will immediately deploy upon return to their responsibilities. The 300+ financial forensics/forensic accounting tools, techniques, methods, and methodologies are offered nowhere else and in no other programs throughout the U.S. FAIM® is the only financial forensics/forensic accounting methodology published by the United States Department of Justice and the American Bar Association.

Report Writing: Review and Analysis

To learn more, visit www.theCTI.com/RW

June 5–6

Additional Registration Fee—Members: $1,080/Non-Members: $1,200. Early registration discounts available. Multiple-attendee discounts do not apply.

This course qualifies for 12 bonus points toward NACVA-Credentialed member recertification, in addition to course CPE.

It is incumbent upon the valuator to fully understand the standards by which his or her valuation report will be judged. Review standards are fully implemented in the business valuation profession, but few professionals know full well how to apply them to their own valuation reports. Conventional report writing classes do not delve much into the review process. Report Writing: Review and Analysis includes those elements of the business appraisal review process that will make attendee’s valuation reports much better—readable, credible, and persuasive.
# 2017 Certification and Training Schedule

## Washington, DC
- **May 1–6**: Business Valuation Certification and Training Center

## Chicago, IL
- **June 5–6**: Report Writing: Review and Analysis
- **June 5–7**: Forensic Accounting Academy™
- **June 5–10**: Business Valuation Certification and Training Center
- **June 5–10**: Foundations of Financial Forensics Workshop and MAFF® credential exam
- **June 7**: Case Analysis in Person
- **June 7**: Current Update in Valuations Pre-Conference Symposium
- **June 7**: Litigation Report Writing Workshop
- **June 8–10**: Annual Consultants’ Conference

## San Diego, CA
- **July 24–29**: Business Valuation Certification and Training Center

## Atlanta, GA
- **August 21–26**: Business Valuation Certification and Training Center

## Washington, DC
- **September 11**: Case Analysis in Person
- **September 11**: Current Update in Valuations
- **September 11–14**: Forensic Accounting Academy™
- **September 11–16**: Business Valuation Certification and Training Center
- **September 12–13**: Forensic Accounting SuperConference
- **September 14**: Litigation Report Writing Workshop

## Salt Lake City, UT
- **October 2–7**: Business Valuation Certification and Training Center

## Philadelphia, PA
- **October 16**: Case Analysis in Person
- **October 16**: Current Update in Valuations
- **October 16–21**: Business Valuation Certification and Training Center

## 2018 Training Schedule

### Las Vegas, NV
- **January 22, 2018**: Case Analysis in Person
- **January 22, 2018**: Current Update in Valuations
- **Jan. 22–27, 2018**: Business Valuation Certification and Training Center

### Chicago, IL
- **Apr. 30–May 5, 2018**: Business Valuation Certification and Training Center
2017 Online Training Schedule

Conferences
(broadcast from a live training event)
Annual Consultants’ Conference ........................................... June 8–9
Financial Litigation and Expert Witness SuperConference ... September 12–13
Financial Valuation SuperConference .................................. December 12–13

Best of the Best Live Session Rebroadcasts
Annual Consultants’ Conference ...................................... July 26–27
Forensic Accounting SuperConference ......................... October 16–17
Financial Litigation and Expert Witness SuperConference ... November 29–30
Financial Valuation SuperConference ................................ January 10–11, 2018

Business Valuation Certification and Training Center
(broadcast from a live training event)
May 1–5 October 30–November 3
August 21–25 January 22–26, 2018
October 2–6 April 30–May 4, 2018

Foundations of Financial Forensics Workshop
(broadcast from a live training event)
October 30–November 3 December 11–15

Online Financial Litigation Specialties Conference
July 31–August 4

Effective Expert Witnessing Clinic
From Consulting to Testifying Expert:
The Basics of a Successful Transition ......................... June 26–30
The Testifying Expert’s Report ................................ August 28–September 1
Deposition and Trial Testimony ...................................... October 2–6

Valuing Family Limited Partnerships Workshop
May 8–12 December 4–8
August 28–September 1

Microsoft Excel® for Financial Advisors
September 18–22

CoreValue® #1 Best Selling Business Consulting Software System—Training
May 15–19 November 6–10
August 21–25

Forensic Accounting Academy™
(broadcast from a live training event)
September 11–14 October 31–Nov. 3

Intermediate Business Valuation Training Center
Part 1—May 22–26 Part 2—June 19–23

Advanced Valuation: Applications and Models Workshop
(broadcast from a live training event)
November 1–2

Early registration discounts available. Discounts may not apply to all training programs. Dates and locations are subject to change.
Take a moment to nominate a professional you know in the Business Valuation, Financial Litigation, or related profession that is forty or under who embodies the drive, motivation, and courage needed to be part of the next generation of industry mavericks. Nominees do not need to be affiliated with NACVA/CTI to qualify.

For further details, and to submit your nomination, please visit www.NACVA-CTI.com/forty. Submission deadline is March 31, 2017.
## Registration Fees

### Live Conference

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<td>Case Analysis in Person (CAP)*</td>
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<td>Current Update in Valuations (CUV)</td>
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<td>Pre-Conference Symposium*</td>
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<td>Litigation Report Writing Workshop†</td>
<td>$540</td>
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<td>Spouse/Guest Fee</td>
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<td>per person (covers food and beverages at continental breakfasts, AM and PM breaks, luncheons, and receptions).</td>
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### Online Conference

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<td>Special Diamond Webinar Series pricing available to allow multiple people in the same office to attend for one low price per office/location. Early registration discounts apply to two-day registrations. Single-day registrations receive 50% of the discount.</td>
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<td>1–5 Registrants Per Day</td>
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<td>6–10 Registrants Per Day</td>
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### Concurrent Training Courses†:

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<th>Event</th>
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<tr>
<td>Report Writing: Review and Analysis .</td>
<td>$1,080</td>
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<tr>
<td>June 5–6</td>
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<td>for NACVA, KVD, or IBA Members.</td>
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<tr>
<td>Forensic Accounting AcademyTM</td>
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<tr>
<td>Business Valuation Certification and Training Center</td>
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<td>Non-Member package pricing.</td>
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<tr>
<td>Foundations of Financial Forensics Workshop &amp; Master Analyst in Financial Forensics™ (MAFF®) Proctored Exam Package</td>
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### Early Registration Discounts:

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<tr>
<td>$100</td>
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<tr>
<td>$50</td>
<td>if paid by 4/30/17</td>
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### Multiple-Attendee Discounts‡:

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<th>Attendees</th>
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<td>2–3</td>
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<tr>
<td>4–5</td>
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<tr>
<td>6+</td>
<td>$150</td>
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For more information and to register, visit [www.AnnualConsultantsConference.com](http://www.AnnualConsultantsConference.com) or call Member/Client Services at (800) 677-2009.

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* No early registration or multiple-attendee discounts apply.
† No multiple-attendee discounts for this course. Early registration discounts available (10% if paid by 3/31/17; 5% if paid by 4/30/17).
‡ Same firm in same physical office and paying together. Discount is per registrant. Call Member/Client Services to register multiple-attendees.
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