

Conference Agenda

CHICAGO 2017



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Wednesday, June 7, 2017

Business Valuation	Healthcare	Financial Reporting	Exit Planning/ Mergers & Acquisitions	Financial Litigation/ Expert Witness	Practice Management	Broadcast Live Broadcast Live via YouTube (No CPE) Advanced
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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 <i>Mark Hanson, Mark Kucik, Carl Steffen</i>	
SESSION TRACKS	Current Update in Valuations (CUV) Pre-Conference Symposium (Additional Registration Fee Required)	Litigation Report Writing Workshop (Additional Registration Fee Required)
8:30–10:15 a.m. 2 Hrs CPE	KEYNOTE: Cost of Capital—Current Controversies and New Research <i>Roger Grabowski</i>	Litigation Report Writing Workshop <i>Howard Zandman</i>
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 <i>Peter Agrapides, Melissa Gragg</i>	Litigation Report Writing Workshop <i>(continued)</i>
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 <i>Panel: Marc Bello, Robert Grossman, Garth Tebay, Courtney Sparks White</i>	Litigation Report Writing Workshop <i>(continued)</i>
3:15–3:30 p.m.	AFTERNOON BREAK, REGISTRATION, AND EXHIBITS	
3:30–5:15 p.m. 2 Hrs CPE	Daubert Update <i>Panel: Marc Bello, Robert Grossman, Garth Tebay, Courtney Sparks White</i>	Litigation Report Writing Workshop <i>(continued)</i>
5:15–6:15 p.m.	WINDY CITY OPENING RECEPTION	
6:15–11:00 p.m.	SUNSET DINNER CRUISE <i>(prior ticket purchase required)</i>	
6:15–11:00 p.m.	DINE-AROUNDS	

Contact NACVA Member/Client Services at (800) 677-2009 to Register.

6:30–8:00 a.m.	REGISTRATION, CONTINENTAL BREAKFAST, AND EXHIBITS					
7:00–7:50 a.m. 1 Hr CPE	Around the Valuation World Morning Show <i>Around the Valuation World Correspondents</i>					YouTube
8:10–9:50 a.m. 2 Hrs CPE	KEYNOTE: The Reinvention of America <i>Peter Leyden</i>					((()))
9:50–10:10 a.m.	MORNING BREAK AND EXHIBITS					
SESSION TRACKS	Track One	Track Two	Track Three	Track Four	Track Five	Track Six
	Business Valuation and Financial Litigation— How to Do It: From Foundations to Advanced		Current Trends	Business Applications, Communication, and Practice Management	Specialty Areas of Practice	Repeated Sessions
10:10–11:50 a.m. 2 Hrs CPE	The Reasonable Certainty Requirement in Lost Profits Litigation—Best Practices for Proving Your Damages Calculation <i>Mike Costello</i>	Cost of Capital—Who Cares if You have it “Right” Up through the Alleged Size Premium? It’s the Next Step that Makes All the Difference <i>Peter Butler</i>	Valuing Things You Cannot See <i>Neil Beaton</i>	Handling Electronically Stored Information (ESI) in a Fraud Investigation <i>Kathy Phelps</i>	Nuances in the Valuation of Service Line Joint Ventures <i>Jason Ruchaber</i>	
11:50 a.m.–12:50 p.m.	NETWORKING LUNCHEON AND EXHIBITS					
12:50–1:40 p.m. 1 Hr CPE	Financial Statements—Written Confessions <i>Darrell D. Dorrell</i> <i>Greg Gadawski</i>	The Sanity Check—Hypothetical Willing Buyer and Willing Seller Test <i>Jill Ellen R. Christopher, Garth Tebay</i>	FASB Update on Issues Affecting Business Valuation <i>Michael Cheng</i>	Secrets of High-Growth Financial Services Firms—Findings from Hinge’s 2017 Annual High-Growth Study <i>Lee Frederiksen</i>	Buy Sell Agreements—The Business Will (or Won’t) <i>Steve Egna</i>	
1:40–2:00 p.m.	QUICK BREAK AND EXHIBITS					
2:00–3:40 p.m. 2 Hrs CPE	Divorce Valuations—Who Owns the Personal Goodwill? <i>Alan Zipp</i>	Working Your Way through the DLOM Minefield <i>R. James “Jim” Alerding</i>	Commercial Reasonableness of Physician Compensation—Analytical Update with MACRA <i>Robert James Cimasi, Todd Zigrang</i>	Practical Application of ASC 805 and Best Practices for Financial Reporting Engagements <i>Nathan DiNatale</i>	Grantor Trusts—What Every Practitioner Should Know about IDGTs <i>Eido Walny</i>	Double Dip—Bringing Clarity to this Complex Issue <i>Marc Bello,</i> <i>Courtney Sparks White</i>
3:40–4:00 p.m.	AFTERNOON BREAK AND EXHIBITS					
4:00–4:50 p.m. 1 Hr CPE	The Expert’s Role in Financial Litigation—Real-World Guidance for Managing the Engagement <i>T.J. Liles-Tims, Howard Zandman</i>	Calculation Engagement vs. Valuation Engagement <i>R. James “Jim” Alerding</i>	Impact of Leases Standard on Business Valuation Metrics <i>Judith O’Dell</i>	Preparing the Younger Generation <i>Prof. Sanjay Deshmukh</i>	Resolving Family Law Disputes <i>Randy Kessler</i>	Federal and State Case Law Update <i>Peter Agrapides,</i> <i>Melissa Gragg</i>
4:50–5:10 p.m.	SESSION RESET					
5:10–6:00 p.m. 1 Hr CPE	Hardball with Hitchner—Solid Answers to Your Tough Questions <i>Jim Hitchner and Panelists</i>					YouTube
6:00–7:00 p.m.	HAPPY HOUR AND EXHIBITS					
6:00–11:00 p.m.	CUBS BASEBALL GAME / ART INSTITUTE (both require prior ticket purchase)					
7:00–11:00 p.m.	DINE - AROUNDS					

Friday, June 9, 2017

Business Valuation	Healthcare	Financial Reporting	Exit Planning/ Mergers & Acquisitions	Financial Litigation/ Expert Witness	Practice Management
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Broadcast Live
 Broadcast Live via YouTube (No CPE)
 Advanced

REGISTRATION, CONTINENTAL BREAKFAST, AND EXHIBITS						
6:30–8:00 a.m.	REGISTRATION, CONTINENTAL BREAKFAST, AND EXHIBITS					
7:00–7:50 a.m. 1 Hr CPE	Around the Valuation World Morning Show <i>Around the Valuation World Correspondents</i>					
8:10–9:50 a.m. 2 Hrs CPE	KEYNOTE: Experts Sabotaging Themselves in Court—The Judges Tell All <i>Moderated by Michael Kaplan; Panel: Honorable Judge Elizabeth Gonzalez, Honorable Judge Steven I. Platt (Ret.), Honorable Judge Christopher P. Yates</i>					
9:50–10:10 a.m.	MORNING BREAK AND EXHIBITS					
SESSION TRACKS	Track One	Track Two	Track Three	Track Four	Track Five	Track Six
	Business Valuation and Financial Litigation— How to Do It: From Foundations to Advanced		Current Trends	Business Applications, Communication, and Practice Management	Specialty Areas of Practice	International
10:10–11:50 a.m. 2 Hrs CPE	The 3 R's of Being a Defense Expert—Reviewin', Ritin', and Rebuttin' <i>Rebekah Smith</i>	Valuing Complex Family Limited Partnerships and LLCs <i>Bruce Johnson</i>	The Impact of Adverse Regulatory Action on Valuation <i>Chris Hamilton</i>	Getting Paid What Your Services are Worth <i>Stephen Kirkland</i>	Key Elements in Calculating Losses in Personal Injury and Wrongful Death Litigation <i>Shannon Shipp</i>	Review of the International CAPM <i>Thomas O'Brien</i>
11:50 a.m.–12:50 p.m.	NETWORKING LUNCHEON AND EXHIBITS					
12:50–1:40 p.m. 1 Hr CPE	Corporate Divorce Litigation—Understanding its Dynamics and Formulating Solutions <i>Hubert Klein</i>	Matching Fundamental Risk and Return <i>James Harrington</i>	Common Sense and the S Corp Value Question—A Reality Check <i>Sarah von Helfenstein</i>	Experts, Mediation, and Confidentiality—How to Avoid Mistakes <i>Nancy Neal Yeend</i>	Value Enhancement in Relation to an Exit Plan <i>Linda Nayder</i>	Transfer Pricing and Valuing International Entities and Global Intangibles <i>Guy Sanschagrin</i>
1:40–2:00 p.m.	QUICK BREAK AND EXHIBITS					
2:00–3:40 p.m. 2 Hrs CPE	Taking a Deeper Dive into the Lost Profits "But-For" World <i>Michael Pakter</i>	Regression Analysis—Construction and Interpretation <i>Lari Masten, Mark Shirley</i>	The Psychology of Exits—Stop Waiting for the Cat to Bark <i>Allie Harding, Andrew Taylor</i>	Internet and Reputation Marketing for Financial Advisors <i>Colin Brown</i>	The Good, Bad, and Wealthy—Top Five Financial Issues in High Net-Worth Divorces <i>Melissa Gragg, Sophy Raza</i>	Working Your Way through the DLOM Minefield <i>R. James "Jim" Alerding</i>
3:40–4:00 p.m.	AFTERNOON BREAK AND EXHIBITS					
4:00–4:50 p.m. 1 Hr CPE	Forensic Accounting Techniques in Business Appraisals <i>Karen Kaseno</i>	Valuation of Debt and Preferred Stock <i>Vincent Covrig, Daniel McConaughy</i>	Preventing Fraud and Mismanagement in Government Systems and Structures <i>Joseph R. Petrucelli</i>	The Business Appraiser as Client Advocate <i>Howard Lewis</i>	Industry Specialty Roundtables <i>Subject Matter Experts</i>	Matching Fundamental Risk and Return <i>James Harrington</i>
4:50–5:10 p.m.	SESSION RESET					
5:10–6:00 p.m. 1 Hr CPE	Hardball with Hitchner—Solid Answers to Your Tough Questions <i>Jim Hitchner and Panelists</i>					
6:00–11:00 p.m.	DINE - AROUNDS					

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6:30–8:00 a.m. CONTINENTAL BREAKFAST				
7:00–7:50 a.m. 1 Hr CPE Around the Valuation World Morning Show Around the Valuation World Correspondents				
SESSION TRACKS	Track One <i>(Co-Sponsored by ValuSource)</i>	Track Two <i>(Co-Sponsored by Courtroom Boot Camp)</i>	Track Three <i>(Co-Sponsored by CoreValue®)</i>	Proctored Exams
	Databases and Software	Business Applications, Communication, and Practice Management		
8:00–8:50 a.m. 1 Hr CPE	RMA Valuation Edition— Enhancing Your Credibility <i>Dave Miles</i>	Theatre Skills and Expert Witnesses <i>Michael Kaplan, Jessie Wilson</i>	Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp <i>George Sandman</i>	Certified Valuation Analyst® (CVA®) Master Analyst in Financial Forensics™ (MAFF®)
8:50–9:05 a.m.	BEVERAGE REFRESH			
9:05–10:45 a.m. 2 Hrs CPE	Business Valuation Manager™ Pro Hands-On Clinic <i>Jeff Harwell, Dave Miles, Frank Wisehart</i>	Theatre Skills and Expert Witnesses <i>(continued)</i>	Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp <i>(continued)</i>	
10:45–11:00 a.m.	BEVERAGE REFRESH			
11:00 a.m.–12:45 p.m. 2 Hrs CPE	Business Valuation Manager™ Pro Hands-On Clinic <i>(continued)</i>	Theatre Skills and Expert Witnesses <i>(continued)</i>	Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp <i>(continued)</i>	
12:45 p.m.	CONFERENCE CONCLUDES			

Concurrent Training Courses

Report Writing: Review and Analysis

Monday, June 5–
Tuesday, June 6

Business Valuation Certification and Training Center

Certified Valuation Analyst® (CVA®) Proctored Exam

Monday, June 5–
Saturday, June 10

Foundations of Financial Forensics Workshop

Master Analyst in Financial Forensics™ (MAFF®) Proctored Exam

Monday, June 5–
Saturday, June 10

Forensic Accounting Academy™

Monday, June 5–
Wednesday, June 7

Seminar Cancellations:

There is no charge to reschedule your training. Cancellations 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 cancellations. A \$150 administration fee will be charged for Annual Consultants' Conference cancellations. If requesting a refund, any credit vouchers and/or Pacesetter® Points applied to the original purchase will be forfeited. Cancellations 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.

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