**Conference Agenda**

**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

**SESSION TRACKS**

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

- **8:30 – 10:15 a.m.**
  - Keynote: Cost of Capital—Current Controversies and New Research
    - Roger Grabowski

- **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 – 3:30 p.m.**
  - Afternoon Break, Registration, and Exhibits

- **3:30 – 5:15 p.m.**
  - Daubert
    - 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

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

The Consultants’ Training Institute® (CTI®) 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 final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org. For NASBA-related information on CPE, please refer to www.theCTI.com.
### Thursday, June 8, 2017

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<tr>
<th>Time</th>
<th>Event</th>
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<tr>
<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</td>
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<td>8:10–9:50 a.m.</td>
<td>2 Hrs CPE</td>
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<td>9:50–10:10 a.m.</td>
<td><strong>MORNING BREAK AND EXHIBITS</strong></td>
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<td>10:10–11:50 a.m.</td>
<td>2 Hrs CPE</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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<td>12:50–1:40 p.m.</td>
<td>1 Hr CPE</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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<td>2:00–3:40 p.m.</td>
<td>2 Hrs CPE</td>
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<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</td>
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<tr>
<td>4:50–5:10 p.m.</td>
<td><strong>SESSION RESET</strong></td>
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<tr>
<td>5:10–6:00 p.m.</td>
<td>1 Hr CPE</td>
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<td>6:00–7:00 p.m.</td>
<td><strong>HAPPY HOUR AND EXHIBITS</strong></td>
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<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><strong>DINE-AROUNDS</strong></td>
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### Around the Valuation World Morning Show

- **Session Tracks**
  - **Track One**: Business Valuation and Financial Litigation — How to Do It: From Foundations to Advanced
    - The Reasonable Certainty Requirement in Lost Profits Litigation — Best Practices for Proving Your Damages Calculation
      - Mike Costello
    - 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
      - Peter Butler
  - **Track Two**: Current Trends
    - Around the Valuation World Morning Show Correspondents
  - **Track Three**: Business Applications, Communication, and Practice Management
    - Valuing Things You Cannot See
      - Neil Beaton
    - Handling Electronically Stored Information (ESI) in a Fraud Investigation
      - Kathy Phelps
  - **Track Four**: Specialty Areas of Practice
    - Nuances in the Valuation of Service Line Joint Ventures
      - Jason Ruchaber
  - **Track Five**: Repeated Sessions
    - Buy Sell Agreements — The Business Will (or Won’t)
      - Steve Egna
  - **Track Six**: Repeated Sessions
    - Secrets of High-Growth Financial Services Firms — Findings from Hinge’s 2017 Annual High-Growth Study
      - Lee Frederiksen

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### Keynote: The Reinvention of America

- Peter Leyden

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### Afternoon Sessions

- **4:00–4:50 p.m.**
  - The Expert’s Role in Financial Litigation — Real-World Guidance for Managing the Engagement
    - T.J. Liles-Tims, Howard Zandman
  - Calculation Engagement vs. Valuation Engagement
    - R. James “Jim” Alerding
  - Impact of Leases Standard on Business Valuation Metrics
    - Judith O’Dell
  - Preparing the Younger Generation
    - Prof. Sanjay Deshmukh
  - Resolving Family Law Disputes
    - Randy Kessler
  - Federal and State Case Law Update
    - Peter Agrapides, Melissa Gragg

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### Evening Activities

- **6:00–11:00 p.m.**
  - CUBS BASEBALL GAME / ART INSTITUTE (both require prior ticket purchase)
  - **DINE-AROUNDS**

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### Session Reset

- Hardball with Hitchner — Solid Answers to Your Tough Questions
  - Jim Hitchner and Panelists

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**Annual Consultants’ Conference**

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Broadcast Live via YouTube (No CPE)
### Friday, June 9, 2017

#### Morning, 6:30–8:00 a.m.

**Registration, Continental Breakfast, and Exhibits**

**Annual Consultants’ Conference**

*Around the Valuation World Morning Show*

**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*

#### Session Tracks

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<th>Track One</th>
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<th>Track Three</th>
<th>Track Four</th>
<th>Track Five</th>
<th>Track Six</th>
</tr>
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<tbody>
<tr>
<td>10:10–11:50 a.m.</td>
<td><strong>The 3 R’s of Being a Defense Expert — Reviewin’, Ritin’, and Rebuttin’</strong> Rebekah Smith</td>
<td><strong>Valuing Complex Family Limited Partnerships and LLCs</strong> Bruce Johnson</td>
<td><strong>The Impact of Adverse Regulatory Action on Valuation</strong> Chris Hamilton</td>
<td><strong>Getting Paid What Your Services are Worth</strong> Stephen Kirkland</td>
<td><strong>Key Elements in Calculating Losses in Personal Injury and Wrongful Death Litigation</strong> Shannon Shipp</td>
<td><strong>Review of the International CAPM</strong> Thomas O’Brien</td>
</tr>
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#### Morning Break and Exhibits

11:50 a.m.–12:50 p.m.

**Corporate Divorce Litigation — Understanding its Dynamics and Formulating Solutions** Hubert Klein

**Matching Fundamental Risk and Return** James Harrington

**Common Sense and the S Corp Value Question — A Reality Check** Sarah von Heffenstein

**Experts, Mediation, and Confidentiality — How to Avoid Mistakes** Nancy Neal Yeend

**Value Enhancement in Relation to an Exit Plan** Linda Nayer

**Transfer Pricing and Valuing International Entities and Global Intangibles** Guy Sanschagrin

#### Networking Luncheon and Exhibits

12:50–1:40 p.m.

**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**

#### Quick Break and Exhibits

1:40–2:00 p.m.

**Taking a Deeper Dive into the Lost Profits “But-For” World** Michael Pakter

**Regression Analysis — Construction and Interpretation** Lari Masten, Mark Shirley

**The Psychology of Exits — Stop Waiting for the Cat to Bark** Allie Harding, Andrew Taylor

**Internet and Reputation Marketing for Financial Advisors** Colin Brown

**The Good, Bad, and Wealthy — Top Five Financial Issues in High Net-Worth Divorces** Melissa Gragg, Sophy Raza

**Working Your Way through the DLOM Minefield** R. James “Jim” Alerding

#### Afternoon Break and Exhibits

3:40–4:00 p.m.

**Forensic Accounting Techniques in Business Appraisals** Karen Kaseno

**Valuation of Debt and Preferred Stock** Vincent Covrig, Daniel McConaughy

**Preventing Fraud and Mismanagement in Government Systems and Structures** Joseph R. Petrucelli

**The Business Appraiser as Client Advocate** Howard Lewis

**Industry Specialty Roundtables** Subject Matter Experts

**Matching Fundamental Risk and Return** James Harrington

#### Session Reset

4:50–5:10 p.m.

**Hardball with Hitchner — Solid Answers to Your Tough Questions**

*Jim Hitchner and Panelists*

#### Dinner Roundtables

6:00–11:00 p.m.

Contact NACVA Member/Client Services at (800) 677-2009 to Register.
### Continental Breakfast
7:00–7:50 a.m.
**CONTINENTAL BREAKFAST**
7:00–7:50 a.m.
1 Hr CPE

#### Around the Valuation World Morning Show
8:00–8:50 a.m.
1 Hr CPE

#### Around the Valuation World Correspondents
8:00–8:50 a.m.
1 Hr CPE

### Session Tracks

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<tr>
<th>Time</th>
<th>Track One (Co-Sponsored by ValuSource)</th>
<th>Track Two (Co-Sponsored by Courtroom Boot Camp)</th>
<th>Track Three (Co-Sponsored by CoreValue®)</th>
<th>Proctored Exams</th>
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<tbody>
<tr>
<td>8:00–8:50 a.m.</td>
<td>RMA Valuation Edition—Enhancing Your Credibility Dave Miles</td>
<td>Theatre Skills and Expert Witnesses Michael Kaplan, Jessie Wilson</td>
<td>Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp George Sandman</td>
<td>Certified Valuation Analyst® (CVA®)</td>
</tr>
<tr>
<td>8:50–9:05 a.m.</td>
<td>Business Valuation Manager™ Pro Hands-On Clinic Jeff Harwell, Dave Miles, Frank Wisehart</td>
<td>Theatre Skills and Expert Witnesses (continued)</td>
<td>Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp (continued)</td>
<td>Master Analyst in Financial Forensics™ (MAFF®)</td>
</tr>
<tr>
<td>9:05–10:45 a.m.</td>
<td>Business Valuation Manager™ Pro Hands-On Clinic (continued)</td>
<td>Theatre Skills and Expert Witnesses (continued)</td>
<td>Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp (continued)</td>
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### 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

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

### Seminar Cancellations:
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. Cancelation 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.