

Session's Delivery Method indicated below: Virtual = Online Only | Hybrid = In-Person and Virtual

		Welcome   Registration		
5:50–7:30 a.m. (PT) 6:50–8:30 a.m. (MT) 7:50–9:30 a.m. (CT) 8:50–10:30 a.m. (ET) 2 Hrs CPE	<p align="center"><b>Keynote: Disruption, Opportunity, and Flashing Red Lights to Pay Attention to in Professional Service Firms</b> Daniel Hood, Bob Lewis, Michael Platt</p> <p align="center"><i>Virtual</i></p>			
	Track One	Track Two	Track Three	
	Current Trends	Company Growth <i>Co-Sponsored by CoreValue Software (Moderated by George Sandmann)</i>	Healthcare <i>Co-Sponsored by Institute for Healthcare Valuation and Health Capital Consultants (Moderated by Jessica Bailey-Wheaton and Todd Zigrang)</i>	
7:45–9:25 a.m. (PT) 8:45–10:25 a.m. (MT) 9:45–11:25 a.m. (CT) 10:45–12:25 p.m. (ET) 2 Hrs CPE	<p align="center"><b>Finding New Clients in Today's Economy</b> Greg Chambers</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>3 Dimensions of Business Growth™</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>	<p align="center"><b>Regulatory Overview for Valuation Professionals</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>	
BREAK (15 Minutes)				
9:40–11:20 a.m. (PT) 10:40–12:20 p.m. (MT) 11:40–1:20 p.m. (CT) 12:40–2:20 p.m. (ET) 2 Hrs CPE	<p align="center"><b>Valuing Closely-Held Farms and Ranches with Economic Reality</b> Ericka Heiser</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>Analyze: Deep Analysis using CoreValue Software</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>	<p align="center"><b>The Due Diligence Imperative in the Era of Value-Based Reimbursement</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>	
LUNCH BREAK (40 Minutes)				
12:00–1:40 p.m. (PT) 1:00–2:40 p.m. (MT) 2:00–3:40 p.m. (CT) 3:00–4:40 p.m. (ET) 2 Hrs CPE	<p align="center"><b>Changing the Market Data and Modeling Landscape</b> Adam Luke, Derek Zweig</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>Prioritizing Strategic Projects: Creating Predictable Revenue Growth</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>	<p align="center"><b>The Valuation of Healthcare Enterprises in a Changing Reimbursement Environment</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>	
BREAK (15 Minutes)				
1:55–3:35 p.m. (PT) 2:55–4:35 p.m. (MT) 3:55–5:35 p.m. (CT) 4:55–6:35 p.m. (ET) 2 Hrs CPE	<p align="center"><b>Forensic Analysis of IRS Enforcement of Corporate Offshore Profit Shifting</b> Stephen Curtis</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>Execute: Taking Action, Driving Results</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>	<p align="center"><b>Stark Law Modernization: The Healthcare Valuation Implications</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>	

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Welcome				
5:35–6:25 a.m. (PT) 6:35–7:25 a.m. (MT) 7:35–8:25 a.m. (CT) 8:35–9:25 a.m. (ET) 1 Hr CPE	<p align="center"><b>Around the Valuation World Morning Show</b> Around the Valuation World Correspondents</p> <p align="center"><i>Virtual</i></p>			
6:40–7:30 a.m. (PT) 7:40–8:30 a.m. (MT) 8:40–9:30 a.m. (CT) 9:40–10:30 a.m. (ET) 1 Hr CPE	<p align="center"><b>COVID-19 One Year Later: Lessons Learned About Cost of Capital Assumptions</b> Jim Harrington, Carla Nunes</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>New Standards for Conducting Financial Forensics</b> David Wolfe</p> <p align="center"><i>Virtual</i></p>		
Track One	Track Two	Track Three	Track Four	
<b>Best Practices in Business Valuation</b>	<b>Project Management Tools</b>	<b>Healthcare</b> <i>Co-Sponsored by Institute for Healthcare Valuation and Health Capital Consultants (Moderated by Jessica Bailey-Wheaton and Todd Zigrang)</i>	<b>Exit Planning</b> <i>Co-Sponsored by Pinnacle Equity Solutions and The International Growth &amp; Exit Planning Association (Moderated by John Leonetti)</i>	
7:45–9:25 a.m. (PT) 8:45–10:25 a.m. (MT) 9:45–11:25 a.m. (CT) 10:45–12:25 p.m. (ET) 2 Hrs CPE	<p align="center"><b>The Income Approach, including the Capitalized Cash Flow Method and the Discounted Cash Flow Method</b> Jim Alerding, Jim Hitchner</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>Mitigating Risk of Business E-mail Compromise</b> Dorothy Haraminac</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>Competitive Forces in the Healthcare Industry</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>	<p align="center"><b>Session Information Forthcoming</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>
BREAK (15 Minutes)				
9:40–11:20 a.m. (PT) 10:40–12:20 p.m. (MT) 11:40–1:20 p.m. (CT) 12:40–2:20 p.m. (ET) 2 Hrs CPE	<p align="center"><b>Cost of Capital</b> Jim Alerding, Jim Hitchner</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>Work Smarter, Not Harder: Maximizing Technology in Your Forensics and Valuation Practice</b> Rebekah Smith</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>Development of a Commercial Reasonableness Opinion</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>	<p align="center"><b>Session Information Forthcoming</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>
LUNCH BREAK (40 Minutes)				
12:00–1:40 p.m. (PT) 1:00–2:40 p.m. (MT) 2:00–3:40 p.m. (CT) 3:00–4:40 p.m. (ET) 2 Hrs CPE	<p align="center"><b>Growth Rates</b> Jim Alerding, Jim Hitchner</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>Building Flexible Models with Microsoft Excel's New Dynamic Arrays</b> Carl Seidman</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>Technological Advancements in the Healthcare Industry</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>	<p align="center"><b>Session Information Forthcoming</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>
BREAK (15 Minutes)				
1:55–3:35 p.m. (PT) 2:55–4:35 p.m. (MT) 3:55–5:35 p.m. (CT) 4:55–6:35 p.m. (ET) 2 Hrs CPE	<p align="center"><b>Case Study and Sample Report</b> Jim Alerding, Jim Hitchner</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>Automating Your Valuation Reports</b> Nick Mears</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>Valuation of Physician Compensation</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>	<p align="center"><b>Session Information Forthcoming</b></p> <p align="center"><i>Hybrid—NACVA State Chapter</i></p>

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**There are no sessions or courses scheduled for Wednesday, June 23, 2021**

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Welcome				
5:35–6:25 a.m. (PT) 6:35–7:25 a.m. (MT) 7:35–8:25 a.m. (CT) 8:35–9:25 a.m. (ET) 1 Hr CPE	<p><b>Around the Valuation World Morning Show</b> Around the Valuation World Correspondents</p> <p><i>Virtual</i></p>			
6:40–7:30 a.m. (PT) 7:40–8:30 a.m. (MT) 8:40–9:30 a.m. (CT) 9:40–10:30 a.m. (ET) 1 Hr CPE	<p><b>Keynote: Cyber Security and Data Privacy</b> David Sems</p> <p><i>Hybrid—Park City, UT</i></p>			
Track One	Track Two	Track Three	Track Four	
Best Practices in Business Valuation	Financial Litigation Specialties	Applications and Models	Mergers and Acquisitions	
7:45–9:25 a.m. (PT) 8:45–10:25 a.m. (MT) 9:45–11:25 a.m. (CT) 10:45–12:25 p.m. (ET) 2 Hrs CPE	<p><b>Market Approach, including Guideline Company Transactions Method and Guideline Public Company Method</b> Jim Alerding, Jim Ewart <i>Hybrid—Park City, UT</i></p>	<p><b>Valuing Goodwill in Professional Practices and the Use and Misuse of the Excess Earnings Method</b> Ron Seigneur, John Tatlock <i>Hybrid—Park City, UT</i></p>	<p><b>Introduction to Monte Carlo Simulation Using @RISK</b> David Solis <i>Virtual</i></p>	<p><b>Gift and Estate</b> Michael Binz <i>Virtual</i></p>
BREAK (15 Minutes)				
9:40–11:20 a.m. (PT) 10:40–12:20 p.m. (MT) 11:40–1:20 p.m. (CT) 12:40–2:20 p.m. (ET) 2 Hrs CPE	<p><b>Pass-Through Entities, including Tax Affecting and Pass-Through Entities Premium Models</b> Jim Alerding, Jim Ewart <i>Hybrid—Park City, UT</i></p>	<p><b>Lost Profits or Lost Earning Capacity: Estimating Lost Income for the Self-Employed</b> Allyn Needham <i>Virtual</i></p>	<p><b>DCF Equity vs. DCF Invested Capital: Which is Preferred?</b> Kevin Couillard Richard Goeldner <i>Hybrid—Park City, UT</i></p>	<p><b>Value Drivers and Deal Killers in a Hot CPA M&amp;A Market</b> Bob Lewis <i>Virtual</i></p>
LUNCH BREAK (40 Minutes)				
12:00–1:40 p.m. (PT) 1:00–2:40 p.m. (MT) 2:00–3:40 p.m. (CT) 3:00–4:40 p.m. (ET) 2 Hrs CPE	<p><b>Business Valuation and COVID-19</b> Jim Alerding, Jim Ewart <i>Hybrid—Park City, UT</i></p>	<p><b>How Can Financial Forensics Prove Bankruptcy Fraud?</b> Michael Pakter <i>Virtual</i></p>	<p><b>Profit Margin Adjustments: The Line Between an Opinion of Value and Withdrawing from the Engagement</b> Jason Pierce <i>Hybrid—Park City, UT</i></p>	<p><b>Forensic Accounting Skills for Transaction Advisory Services Matters</b> Darrell D. Dorrell <i>Virtual</i></p>
BREAK (15 Minutes)				
1:55–2:45 p.m. (PT) 2:55–3:45 p.m. (MT) 3:55–4:45 p.m. (CT) 4:55–5:45 p.m. (ET) 1 Hr CPE	<p><b>Case Study and Sample Report</b> Jim Alerding, Jim Ewart <i>Hybrid—Park City, UT</i></p>	<p><b>Fundamentals of Financial Forecasting</b> Mark Shirley <i>Virtual</i></p>	<p><b>Empirical Research Regarding Discounts for Lack of Marketability</b> Mark Vianello <i>Hybrid—Park City, UT</i></p>	<p><b>Show Me the Money: Real World Valuations in a (Post) COVID-19 World</b> Kathleen Lauster <i>Virtual</i></p>
BREAK (15 Minutes)				
3:00–3:50 p.m. (PT) 4:00–4:50 p.m. (MT) 5:00–5:50 p.m. (CT) 6:00–6:50 p.m. (ET) 1 Hr CPE	<p><b>Hardball with Hitchner</b> Jim Hitchner <i>Virtual</i></p>			

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6:40–7:30 a.m. (PT) 7:40–8:30 a.m. (MT) 8:40–9:30 a.m. (CT) 9:40–10:30 a.m. (ET) 1 Hr CPE	<p align="center"><b>The Future of the Business Valuation Profession</b> Chris Mercer</p> <p align="center"><i>Hybrid—Park City, UT</i></p>	<p align="center"><b>The Size Effect: It is Still Relevant</b> Roger Grabowski, Jim Harrington</p> <p align="center"><i>Hybrid—Park City, UT</i></p>		
Track One	Track Two	Track Three	Track Four	
Best Practices in Business Valuation	Foundations of Litigation	Business Valuation Specialties	Build and Grow Your Practice	
7:45–9:25 a.m. (PT) 8:45–10:25 a.m. (MT) 9:45–11:25 a.m. (CT) 10:45–12:25 p.m. (ET) 2 Hrs CPE	<p align="center"><b>Discounts and Premiums, including Discounts for Lack of Marketability</b> Jim Alerding, Jim Ewart</p> <p align="center"><i>Hybrid—Park City, UT</i></p>	<p align="center"><b>Excelling in Litigation and Dispute-Related Valuations</b> Bob Ranallo, Sean Saari</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>Best Practices: Valuing Real Estate Development Companies</b> Lari Masten</p> <p align="center"><i>Hybrid—Park City, UT</i></p>	<p align="center"><b>Success, Profits, Results: Using Strategies of the Entrepreneurial Operating System to Gain Traction</b> Joe Paulsen</p> <p align="center"><i>Virtual</i></p>
BREAK (15 Minutes)				
9:40–11:20 a.m. (PT) 10:40–12:20 p.m. (MT) 11:40–1:20 p.m. (CT) 12:40–2:20 p.m. (ET) 2 Hrs CPE	<p align="center"><b>Discounts and Premiums, including Lack of Control and Control Premiums</b> Jim Alerding, Jim Ewart</p> <p align="center"><i>Hybrid—Park City, UT</i></p>	<p align="center"><b>Applying BV Review Standards to Damage Measurement Reporting</b> P. Dermot O'Neill</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>Family Limited Partnerships: Valuation Tools to Help Protect the Family Business</b> Stephen White</p> <p align="center"><i>Hybrid—Park City, UT</i></p>	<p align="center"><b>How to Build Your Authority in the B2B Marketplace using LinkedIn without Spending Money on Ads</b> Colin Brown</p> <p align="center"><i>Virtual</i></p>
LUNCH BREAK (40 Minutes)				
12:00–1:40 p.m. (PT) 1:00–2:40 p.m. (MT) 2:00–3:40 p.m. (CT) 3:00–4:40 p.m. (ET) 2 Hrs CPE	<p align="center"><b>Business Valuation Standards</b> Jim Alerding, Jim Ewart</p> <p align="center"><i>Hybrid—Park City, UT</i></p>	<p align="center"><b>Take Control in the Courtroom: How Powerful Direct Testimony can Neutralize Cross-Examination and Persuade the Jury</b> Michael Kaplan</p> <p align="center"><i>Hybrid—Park City, UT</i></p>	<p align="center"><b>Finally! Senior IRS Valuation Managers Answer Your Questions—Live</b> Ron Cerruti, Howard Lewis, Dorothy Taylor</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>How to Best Sell BVFLS Services with Zoom</b> Rod Burkert</p> <p align="center"><i>Virtual</i></p>
BREAK (15 Minutes)				
1:55–2:45 p.m. (PT) 2:55–3:45 p.m. (MT) 3:55–4:45 p.m. (CT) 4:55–5:45 p.m. (ET) 1 Hr CPE	<p align="center"><b>Case Study and Sample Report</b> Jim Alerding, Jim Ewart</p> <p align="center"><i>Hybrid—Park City, UT</i></p>	<p align="center"><b>You Be the Judge: The Appraiser's Role as Neutral or Trier of Fact</b> Terry Lloyd</p> <p align="center"><i>Hybrid—Park City, UT</i></p>	<p align="center"><b>Don't Call it a "Fast-Food" Restaurant! Valuation of These Valuable Franchises</b> Rick Gray</p> <p align="center"><i>Virtual</i></p>	<p align="center"><b>How to Perfect Your Writing and Improve Your Practice: Business Appraisal Review</b> Howard Lewis</p> <p align="center"><i>Virtual</i></p>
BREAK (15 Minutes)				
3:00–3:50 p.m. (PT) 4:00–4:50 p.m. (MT) 5:00–5:50 p.m. (CT) 6:00–6:50 p.m. (ET) 1 Hr CPE	<p align="center"><b>Hardball with Hitchner</b> Jim Hitchner</p> <p align="center"><i>Virtual</i></p>			