

Wednesday, December 14, 2022

Sessions with 🌴 will have in-person presenters in Ft. Lauderdale. Sessions with ⚡ will have in-person presenters in Park City. Sessions with no in-person presenter ● can be viewed in screening rooms at both locations. All sessions will be broadcast virtually.




















- Business Valuation
- Practice Management
- Financial Litigation/Expert Witness
- Specialty Applications
- Healthcare
- Current Trends
- Exit Planning/Mergers & Acquisitions

6:00–8:00 a.m. MT 6:00–8:30 a.m. ET	Registration and Continental Breakfast	
3:30–5:10 a.m. PT 4:30–6:10 a.m. MT 5:30–7:10 a.m. CT 6:30–8:10 a.m. ET 2 Hrs. CPE	Case in Analysis in Person (CAP) <i>(This course is only offered in Fort Lauderdale and is not a part of the Super Conference. It requires an additional registration fee.)</i> 	Industry Standards and Ethics <i>Mark Kucik, Trisch Garthoeffner</i> <i>(This course is not a part of the Super Conference and requires an additional registration fee. Those not attending in Fort Lauderdale will view it virtually.)</i>
8:10 a.m.–8:30 a.m. ET	BREAK (20 Minutes)	
	Current Update in Valuations	Conference Track
5:30–7:10 a.m. PT 6:30–8:10 a.m. MT 7:30–9:10 a.m. CT 8:30–10:10 a.m. ET 2 Hrs. CPE	Valuation in Litigation and Mediation <i>Melissa Gragg</i> <i>(This course is not a part of the Super Conference and requires an additional registration fee.)</i> 	Beliefs, Behavior, and Fraud in Valuation: Emotional Intelligence to Regulatory Policy, Application and Practice <i>Jack Bigelow, Daven Morrison, Dr. Sri Ramamoorti</i>
10:10–10:30 a.m. ET	BREAK (20 Minutes)	
7:30–9:10 a.m. PT 8:30–10:10 a.m. MT 9:30–11:10 a.m. CT 10:30–12:10 p.m. ET 2 Hrs. CPE	Supply Chain and Labor Challenges Micro and Lower Middle Market M&A <i>Melissa Gragg</i> <i>(This course requires an additional registration fee.)</i> 	Mirror, Mirror of Ethics on the Wall: Who's the Least Complacent of Them All? <i>Jack Bigelow, Dr. Joseph Koletar, Dr. Sri Ramamoorti, Sheila Darby, Renee Fair</i>
12:10–1:00 p.m. ET	LUNCH (50 Minutes)	
10:00–11:40 a.m. PT 11:00–12:40 p.m. MT 12:00–1:40 p.m. CT 1:00–2:40 p.m. ET 2 Hrs. CPE	Best Practices in Valuation <i>Steven Brunner</i> <i>(This course requires an additional registration fee.)</i> 	Building Better BV Engagements: Hands on Tools to Save Time and Money <i>Gregory Clark, Josh Horn</i>
2:40–3:00 p.m. ET	BREAK (20 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	BV Update Divorce Cases <i>Steven Brunner</i> <i>(This course requires an additional registration fee.)</i> 	Keys to Building Distinction in Your Brand <i>Mel Abraham</i>
4:40 p.m. ET	END OF DAY	

Presenters, dates, delivery methods, and session titles are subject to change.




Thursday, December 15, 2022




















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5:00–6:30 a.m. MT 6:30–8:00 a.m. ET		Continental Breakfast			
4:00–4:50 a.m. PT 5:00–5:50 a.m. MT 6:00–6:50 a.m. CT 7:00–7:50 a.m. ET 1 Hr. CPE	 <p><i>Around the Valuation World Morning Show</i> <i>Around the Valuation World Correspondents</i></p>				
7:50–8:10 a.m. ET		BREAK (20 Minutes)			
5:10–6:00 a.m. PT 6:10–7:00 a.m. MT 7:10–8:00 a.m. CT 8:10–9:00 a.m. ET 1 Hr. CPE	 <p>Common Success Characteristics of High Performing Partners and Leaders <i>Allan Koltin</i></p>				
9:00–9:20 a.m. ET		BREAK (20 Minutes)			
Session Tracks	Track One	Track Two	Track Three	Track Four	
6:20–8:00 a.m. PT 7:20–9:00 a.m. MT 8:20–10:00 a.m. CT 9:20–11:00 a.m. ET 2 Hrs. CPE	 <p>Measuring Long-Term Organic Growth: What Macro Factors Drive Organic Growth <i>Dr. Ashok Abbott, Roger Grabowski</i></p>	 <p>Cybersecurity <i>Dr Sri Ramamoorti, David Sems</i></p>	 <p>Working Out the Kinks: Looming Supply Chain Disputes <i>Brad Sargent, James Spencer</i></p>	 <p>Middle Market M&A Valuation: Stop Playing Checkers and Start Playing Chess <i>Stephen White</i></p>	
11:00–11:20 p.m. ET		BREAK (20 Minutes)			
8:20–9:10 a.m. PT 9:20–10:10 a.m. MT 10:20–11:10 a.m. CT 11:20–12:10 p.m. ET 1 Hr. CPE	 <p>Size and Capitalization Adjustments for Market-Based Pricing Multiples <i>Derek Zweig</i></p>	 <p>Looking Back to Go Forward: A Review of the Basics for Lost Profits <i>Allyn Needham</i></p>	 <p>ROI Pricing (means no more fee discounting!) <i>Rod Burkert</i></p>	 <p>Valuation Issues in Divorce <i>Christopher S. Edwards</i></p>	
12:10–1:00 p.m. ET		BRUNCH (Park City) LUNCH (Fort Lauderdale) (50 Minutes)			
10:00–11:40 a.m. PT 11:00–12:40 p.m. MT 12:00–1:40 p.m. CT 1:00–2:40 p.m. ET 2 Hrs. CPE	 <p>Qualitative Analysis: Quantifying the Non-quantifiable <i>Rick Gray</i></p>	 <p>Valuing Healthcare Startups <i>Jessica Bailey-Wheaton, Todd Zigrang</i></p>	 <p>Writing an Effective Exit Plan that Educates and Clarifies Your Owner's Thinking <i>John Leonetti, Jessica LeClair</i></p>	 <p>Report Writing and Trial Exhibits <i>T.J. Liles Tims, Lari Masten, Michael Molder</i></p>	
2:40–3:00 p.m. ET		BREAK (20 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>The Litigation Review Process <i>P. Dermot O'Neill</i></p>	 <p>The Dali Perspective: Surreal Income Streams in Valuation Today <i>Dorothy Haraminac, Jason Pierce</i></p>	 <p>The Sanity Check: Hypothetical Willing Buyer and Willing Seller Test <i>Garth Tebay</i></p>	 <p>Types of Business Interruption Calculations & Business Interruption Claim Opportunities <i>Robert Carter, Kerrie Merrifield</i></p>	
4:40–5:00 p.m. ET		BREAK (20 Minutes)			
2:00–2:50 p.m. PT 3:00–3:50 p.m. MT 4:00–4:50 p.m. CT 5:00–5:50 p.m. ET 1 Hr. CPE	 <p>Sock A Sock / A Shoe and a Sock ... A Sock and a Sock or a Sock and a Shoe? How Not to be Hidebound in Valuation and Financial Forensics <i>T.J. Liles Tims, Lari Masten, Michael Molder</i></p>				
5:50 p.m. ET		END OF DAY			

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Friday, December 16, 2022

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5:00–6:30 a.m. MT 6:30–8:00 a.m. ET		Continental Breakfast			
4:00–4:50 a.m. PT 5:00–5:50 a.m. MT 6:00–6:50 a.m. CT 7:00–7:50 a.m. ET 1 Hr. CPE		 <p><i>Around the Valuation World Morning Show</i> <i>Around the Valuation World Correspondents</i></p>			
7:50–8:10 a.m. ET		BREAK (20 Minutes)			
5:10–6:00 a.m. PT 6:10–7:00 a.m. MT 7:10–8:00 a.m. CT 8:10–9:00 a.m. ET 1 Hr. CPE		 <p>Global Economic Conditions Impacting Business Valuation and Appraisal <i>Simon Rubensohn, Chief Economist, Royal Institution of Chartered Surveyors (RICS)</i></p>			
9:00–9:20 a.m. ET		BREAK (20 Minutes)			
Session Tracks	Track One	Track Two	Track Three	Track Four	
6:20–8:00 a.m. PT 7:20–9:00 a.m. MT 8:20–10:00 a.m. CT 9:20–11:00 a.m. ET 2 Hrs. CPE	 <p><i>qui argentum, et investigandis</i> <i>Darrell Dorrell</i></p>	 <p>A Baker's Dozen Things You Can Do with the Integrated Theory of Business Valuation: Valuation is All About Expected Cash Flow, Risk, and Growth <i>Z. Christopher Mercer</i></p>	 <p>Rate of Return on Capital is Misconceived <i>Ednaldo Silva, Ph.D.</i></p>	 <p>Valuing Family Limited Partnerships <i>Peter Agrapides</i></p>	
11:00–11:20 p.m. ET		BREAK (20 Minutes)			
8:20–9:10 a.m. PT 9:20–10:10 a.m. MT 10:20–11:10 a.m. CT 11:20–12:10 p.m. ET 1 Hr. CPE	 <p>Protecting Your Clients and Family from Financial Elder Abuse Fraud <i>Karen Kaseno</i></p>	 <p>Business Interruptions <i>Marty Abo, Ken Mack, Trisch Garthoeffner</i></p>	 <p>Examining the Mental Readiness of an Owner Who Is Considering an Exit in Today's Economic Environment <i>John Leonetti, Jessica LeClair</i></p>	 <p>Top Five Ethical Complaints and How to Avoid Them <i>John Barrett, Jr., Cheryl Hyder</i></p>	
12:10–1:00 p.m. ET		BRUNCH (Park City) LUNCH (Fort Lauderdale) (50 Minutes)			
10:00–11:40 a.m. PT 11:00–12:40 p.m. MT 12:00–1:40 p.m. CT 1:00–2:40 p.m. ET 2 Hrs. CPE	 <p>Great CPA Firm Liberation <i>Bob Lewis, Dan Hood, Michael Horwitz, Pat Morrell</i></p>	 <p>Why Hasn't this Case Settled Yet <i>Judge Driscoll, Judge Platt (Ret.), Judge Yates, Michael Kaplan</i></p>	 <p>Valuation Consideration for Non-Fungible Tokens or NFTs <i>Nataliya Kalava</i></p>	 <p>Case Study: How to Develop and/or Select Defensible Industry Betas for Use in the CAPM <i>Carla Nunes, Jim Harrington</i></p>	
2:40–3:00 p.m. ET		BREAK (20 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>Current Trends in Family Law: Virtual Developments, Mediation, Arbitration, and Using Experts to Develop Strategies <i>Randy Kessler</i></p>	 <p>Alternate Dispute Resolution and Mediation <i>Judge Driscoll, Judge Platt (Ret.), Judge Yates, Michael Kaplan</i></p>	 <p>How Much is Your Share Worth? Valuing Interests in Service Firms <i>Terry Lloyd</i></p>	 <p>Inflation, Growth, and Corporate Value <i>Prof Bernard Schwetzler</i></p>	
4:40–5:00 p.m. ET		BREAK (20 Minutes)			
2:00–2:50 p.m. PT 3:00–3:50 p.m. MT 4:00–4:50 p.m. CT 5:00–5:50 p.m. ET 1 Hr. CPE	 <p>Young Valuation Experts Panel <i>Moderator: Bob Lewis, Panelists: Nick Contey, Eric Haverkamp, Dalton Hopper, Amy Shaw</i></p>				
5:50 p.m. ET		END OF CONFERENCE			

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