

# Wednesday, July 12, 2023

Wednesday courses are not included with Conference Registration. These courses require an additional Registration Fee to attend.

6:00–8:30 a.m. MT	Registration and Continental Breakfast	
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	Industry Standards and Ethics <i>Mark Kucik, Carl Steffen</i> Course <i>not</i> included with Conference Registration. Requires additional Registration Fee to attend.	Business Valuation Report Peer Review: Case Analysis In-Person CAP Course <i>not</i> included with Conference Registration. Requires additional Registration Fee to attend.
8:10–8:30 a.m. MT	BREAK 20 Minutes	
	Current Update in Valuations Course <i>not</i> included with Conference Registration. Requires additional Registration Fee to attend.	
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	Valuation Verdicts: Federal and State Case Law Update <i>Steve Brunner</i> Session <i>not</i> included with Conference Registration. Requires additional Registration Fee to attend.	
10:10–10:30 a.m. MT	Break 20 Minutes	
9:30–11:10 a.m. PT 10:30–12:10 p.m. MT 11:30–1:10 p.m. CT 12:30–2:10 p.m. ET 2 Hrs CPE	Damages and Family Law Updates <i>Stephen White</i> Session <i>not</i> included with Conference Registration. Requires additional Registration Fee to attend.	
12:10–1:00 p.m. MT	Lunch Break 50 Minutes ( <i>lunch on own</i> )	
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	Business Valuation Body of Knowledge Updates <i>Steve White</i> Session <i>not</i> included with Conference Registration. Requires additional Registration Fee to attend.	
2:40–3:00 p.m. MT	Break 20 Minutes	
2:00–3:40 p.m. PT 3:00–4:40 p.m. MT 4:00–5:40 p.m. CT 5:00–6:40 p.m. ET 2 Hrs CPE	Best Practices for Business Valuation and Litigation <i>Stephen White</i> Session <i>not</i> included with Conference Registration. Requires additional Registration Fee to attend.	

Sessions, Delivery Method, and Presenters subject to change.

# Thursday, July 13, 2023

All sessions will be Hybrid In-Person and Virtual.

 Business Valuation

 Exit Planning/Mergers & Acquisitions

















 Financial Litigation/Expert Witness

 Specialty Applications

 Healthcare

 Current Trends

 Practice Management

6:30–8:00 a.m. MT	Registration, Continental Breakfast, and Exhibits			
6:00–6:50 a.m. PT 7:00–7:50 a.m. MT 8:00–8:50 a.m. CT 9:00–9:50 a.m. ET 1 Hr CPE	Around the Valuation World Morning Show Around the Valuation World Correspondents			
7:50–8:10 a.m. MT	Break 20 Minutes			
7:10–8:00 a.m. PT 8:10–9:00 a.m. MT 9:10–10:00 a.m. CT 10:10–11:00 a.m. ET 1 Hr CPE	We Know Smart Contracts are “Smart” But are They “Ethical”?: Emerging Technologies, Emerging Ethical Risks Dr. Sridhar Ramamoorti			
9:00–9:20 a.m. MT	Break 20 Minutes			
	Track One	Track Two	Track Three	Track Four
8:20–10:00 a.m. PT 9:20–11:00 a.m. MT 10:20–12:00 p.m. CT 11:20–1:00 p.m. ET 2 Hrs CPE	 Developing the Discount Rate for Lost Profits Claims Roger Grabowski	 Recent Developments Impacting the Valuation of S Corporations Dan Van Vleet William McInerney	 Healthcare Valuation: 2023 Updates Jessica Bailey-Wheaton Todd Zigrang	 How Exit Planning Leads to Sale and Success Fee Opportunities John Leonetti
11:00–12:00 p.m. MT	Break 20 Minutes			
10:20–12:00 p.m. PT 11:20–1:00 p.m. MT 12:20–2:00 p.m. CT 1:20–3:00 p.m. ET 2 Hrs CPE	 I Have a Story: Identifying Problematic Standards Issues Before You Take the Stand Lari Masten Kerrie Merrifield	 Valuation Under Interest Rate Volatility Alan Gorlick	 Necessary Considerations for PPP Fraud and SBA Challenge Engagements Robert Carter, Erica Price	 How Employee Stock Ownership Plans Make a Powerful Exit Planning Option Richard Glassman
1:00–1:50 p.m. MT	Lunch Break 50 Minutes			
12:50–1:40 p.m. PT 1:50–2:40 p.m. MT 2:50–3:40 p.m. CT 3:50–4:40 p.m. ET 1 Hr CPE	 Valuations in Private Transactions: Are You Hurting Your Clients? Carrie Stacey	 Integrating Data Analytics with Divorce Valuation Bill Dameworth, Lindsay Gill	 How Valuation Software Improved My Practice and Can Improve Yours Too Steve Brunner, David Fein	
2:40–3:00 p.m. MT	Break 20 Minutes			
2:00–3:40 p.m. PT 3:00–4:40 p.m. MT 4:00–5:40 p.m. CT 5:00–6:40 p.m. ET 2 Hrs CPE	 Piercing the Veil of Fears Michael Molder	 How Effective Experts Best Serve the Litigants, Counsel, and the Trier(s) of Fact Judge Timothy Driscoll, Judge Steven Platt, Judge Christopher Yates, Michael Kaplan	 The Strategic Power of Company-Specific Risk Ken Sanginario	 Today's Complications with Cost of Capital: Get Your Answers Here Carla Nunes, Lari Masten
4:40–5:00 p.m. MT	Break 20 Minutes			
4:00–4:50 p.m. PT 5:00–5:50 p.m. MT 6:00–6:50 p.m. CT 7:00–7:50 p.m. ET 1 Hr CPE	 State of the Valuation Profession Chris Mercer			
6:00–7:00 p.m. MT	Networking Reception			

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# Friday, July 14, 2023

All sessions will be Hybrid In-Person and Virtual.

 Business Valuation

 Exit Planning/Mergers & Acquisitions















 Financial Litigation/Expert Witness

 Specialty Applications

 Healthcare

 Current Trends

 Practice Management

6:30–8:00 a.m. MT	Registration, Continental Breakfast, and Exhibits			
6:00–6:50 a.m. PT 7:00–7:50 a.m. MT 8:00–8:50 a.m. CT 9:00–9:50 a.m. ET 1 Hr CPE	Around the Valuation World Morning Show Around the Valuation World Correspondents			
7:50–8:10 a.m. MT	Break 20 Minutes			
7:10–8:00 a.m. PT 8:10–9:00 a.m. MT 9:10–10:00 a.m. CT 10:10–11:00 a.m. ET 1 Hr CPE	Keynote: Information Forthcoming			
9:00–9:20 a.m. MT	Break 20 Minutes			
	Track One	Track Two	Track Three	Track Four
8:20–10:00 a.m. PT 9:20–11:00 a.m. MT 10:20–12:00 p.m. CT 11:20–1:00 p.m. ET 2 Hrs CPE	 Calculating Reasonable Compensation for Business Valuations Paul Hamann, Stephen Kirkland	 A Forensic Analysis of the Financial Statements of the United States of America Darrell Dorrell	 Survey of Transaction Multiples Across Value Worlds: Past, Present, and Future Scott Gabehart	 Exit Planning Tools: A Working Session on How to Engage Owners on the Topic of Exit Planning Anna Halaburda
11:00–12:00 p.m. MT	Break 20 Minutes			
10:20–12:00 p.m. PT 11:20–1:00 p.m. MT 12:20–2:00 p.m. CT 1:20–3:00 p.m. ET 2 Hrs CPE	 Proving and Disproving Market Efficiency for Valuation Appraisal Hearings Steven Feinstein		 Brand, Trade Names, and Trademarks: Valuation of Intangibles Paul Mandel	 Growing Into a Valuable Exit: How to Increase Company Value Ahead of an Exit Ken Sanginario
1:00–1:50 p.m. MT	Lunch Break 50 Minutes			
12:50–1:40 p.m. PT 1:50–2:40 p.m. MT 2:50–3:40 p.m. CT 3:50–4:40 p.m. ET 1 Hr CPE	 Report Writing Basics ("Just the Facts, Ma’am (Sir)") Katherine Puffer	 Title Forthcoming Ashok Abbott	 Achieve Expert Status in 90 Days with a Little Help from AI Colin Brown	
2:40–3:00 p.m. MT	Break 20 Minutes			
2:00–3:40 p.m. PT 3:00–4:40 p.m. MT 4:00–5:40 p.m. CT 5:00–6:40 p.m. ET 2 Hrs CPE	 Metaverse Valuation: Non-Fungible Tokens (NFTs) Stacey Ferris	 Challenges for Expert Witnesses Valuing Private Equity and Hedge Fund General Partner Interests in Divorce Matters Greg Reagan, Ketan Soni, Esq.	 The Changing Landscape of Divorce Michele Laws, Lili Vasileff	
4:40–5:00 p.m. MT	Break 20 Minutes			
4:00–4:50 p.m. PT 5:00–5:50 p.m. MT 6:00–6:50 p.m. CT 7:00–7:50 p.m. ET 1 Hr CPE	 Young Valuation Analysts Panel Karen Kaseno			
5:50 p.m. MT	Conference Concludes			

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