Become Today’s Financial Super Consultant

- Business Valuation
- Financial Litigation
- Forensic Accounting
- Business Consulting
- Transaction Advisory Services/Middle Market M&A
- Healthcare Valuation
- Exit Planning

Announcing our 2019 Training Schedule
Today’s Businesses Need Financial Super Consultants

Business owners are faced with a myriad of opportunities (and challenges) to remain competitive and viable in the evolving global marketplace. They need **Financial Super Consultants** who can help them build, grow, protect, and defend their company’s value.

**Over a Quarter Century History of Training Excellence**
Through practitioner-focused certification programs and continuing professional education in the highest demand financial consulting areas of specialty, the Consultants’ Training Institute® (CTI®) has transformed the careers and practices for thousands of financial consulting professionals worldwide since 1991.

**The Practitioner's Perspective**
Taught by a worldwide team of accomplished and expertly skilled financial consultants—the Practitioner’s Perspective—CTI’s training is framed from real-world application with judicial, legislative, and financial regulatory precedence and delivers ready-to-use tools and techniques to take your career and practice to the next level.

**Certification and Training Partners**
- National Association of Certified Valuators and Analysts® (NACVA®)
- financialforensics®
- CoreValue® Software
- ValuSource
- KeyValueData®
- Exit Planning Institute™
- Health Capital Consultants
- Surgent CPE

**Financial Super Consultant Areas of Specialization and Continuing Professional Education**

**Business Valuation**
Comprehensive and complete foundational training teaching to the international body of knowledge on valuing private business enterprises.

**Financial Litigation**
Deep dives into special purposes for litigation matters, methodologies, approaches, legal theory, rules of evidence, and testimony.

**Forensic Accounting**
The Art & Science of Investigating People & Money®

**Business Consulting**
Help businesses get stronger, add value, and grow their bottom line.

**Transaction Advisory Services/ Middle Market M&A**
Strategies and tools to grow, enhance, harvest, and protect your client’s company value.

**Healthcare Valuation**
Innovative training to bridge the Four Pillars of Healthcare—regulatory, reimbursement, competition, and technology—for your clients.

**Exit Planning**
Strategic tools and training to help you advance your clients through their exit planning experience.

Call Member/Client Services at (800) 677-2009 or visit theCTI.com.
# Table of Contents

## Credentialing

- Certified Valuation Analyst® (CVA®) ........................................ 2
- Master Analyst in Financial Forensics® (MAFF®) ....................... 3
- Business Valuation Certification and Training Center .................. 4
- Financial Litigation Consulting Professionals Workshop ............. 6
- Global Association of Certified Valuators and Analysts™ ............ 7

## Business Valuation

**Foundations of Business Valuation**
- Current Update in Valuations (CUV) .................................. 8
- Report Writing: Review and Analysis ..................................... 9
- Case Analysis in Person (CAP) or by Webinar (CAW) .............. 10
- Industry Standards and Ethics ............................................ 10
- **NEW** Discounts for Lack of Marketability (DLOM) Workshop ........................................ 12
- Intermediate Business Valuation Training Center .................. 13
- **NEW** Business Valuation Accelerator Workshop ................. 14
- Advanced Valuation: Applications and Models Workshop ......... 15
- **NEW** Understanding Business Valuations for CPAs/Financial Advisors ........................................ 16

**Specialized Business Valuation**
- Valuing Family Limited Partnerships Workshop ..................... 17
- **NEW** Business Valuation Specialty Training ....................... 18

## Financial Litigation

**Foundations of Financial Litigation**
- Litigation Report Writing Workshop ...................................... 19
- Expert Witness Bootcamp ................................................. 20
- **NEW** The Truth, The Whole Truth—Storytelling and Persuasion ........................................ 21
- **NEW** Understanding Financial Litigation for CPAs/Financial Advisors ........................................ 22

**Specialized Financial Litigation**
- **NEW** Financial Litigation Specialty Webinars .................... 23

## Forensic Accounting

- Forensic Accounting Academy® ........................................ 26
- Behavioral Forensics Academy™ ...................................... 27

**Indicates courses that qualify for NACVA recertification bonus points. To learn more, visit www.NACVA.com/BonusPointPrograms.**

## Business Consulting

- **NEW** Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp ........................................ 29

## Transaction Advisory Services/Middle Market M&A

- Transaction Advisory Services (TAS) Workshop ..................... 30
- Advanced Mergers and Acquisitions Workshop .................. 31

## Healthcare Valuation

- **NEW** The Four Pillars of Healthcare Valuation ................. 32

## Exit Planning

- Certified Exit Planning Advisor (CEPA) Credentialing Program ........................................ 33

## Conferences

- 2018 Financial Valuation SuperConference ........................................ 34
- 2019 Annual Consultants’ Conference ........................................ 35
- 2019 Financial Valuation SuperConference ........................................ 36
- 2019 Financial Consultants’ Accelerated Training Institute ....... 36

## Online Training

- **NEW** Around the Valuation World® ........................................ 37
- 2018–2020 Online Training Schedule ........................................ 38
- CPE On-Demand ................................................................. 40
- Surgent CPE ................................................................. 41

**Register Early and SAVE 10% and 5% Discount Deadlines ............... 42**

- NACVA/CTI Information ................................................. 43
- KeyValueData® ................................................................. 44
- Ultimate Membership ...................................................... 45

### Available Training Delivery Options:

- C Live Classroom
- B Live Online Broadcast
- D CPE On-Demand
- S Self-Study
- W Live Online Webinar

**Note:** Dates, locations, and prices are subject to change.
Get Certified!

Establish your authority in matters of value! Bolster your reputation with your clients, enhance your credibility within the business community, and demonstrate competency to the courts that you can articulate business value.

Pathway to the Most Widely Recognized and Global Business Valuation Credential: the CVA

1. Meet the CVA qualifications and apply for the designation*
2. Apply for NACVA Membership or pay CVA Designee fee
3. Study areas in NACVA’s Business Valuation Body of Knowledge (BOK)
4. Pass the CVA Proctored Exam
5. Meet the Experience Threshold—Peer Reviewed Business Valuation Report
6. Pay Annual NACVA Membership fees or Annual CVA Designee Renewal fees and Comply with Tri-Annual Recertification

Recommended training: Business Valuation Certification and Training Center, see page 4

“CNBC’s study revealed that more than 10 million businesses will change hands over the next 10 years in the U.S. alone, with 78 percent of small-business owners planning to sell their company to fund 80 percent of their retirement. Most business owners will be aware of the value of their home, car, and even the accessories they carry, but according to a recent IBISWorld report study, only two percent of business owners know the value of their biggest asset, their business.

Real-time access to valuation data enables business owners to arm themselves with the knowledge needed to stimulate business growth and to capitalize on a wider range of opportunities. An up-to-date valuation will assist entrepreneurs at every stage of their journey —when they are growing their business, when they are making structural changes, and when they finally decide to exit. It’s no exaggeration to say that a valuation is the most important piece of information a business can possess.”

—entrepreneur.com

* Applicants who do not meet the qualifications can apply for and pursue the credential, and hold the CVA Candidate Status until the qualifications are met.

Credibility Matters

The CVA is the only business valuation credential accredited by the National Commission for Certifying Agencies (NCCA).
Become the Master of the Field!

The MAFF credential makes the statement that when it comes to financial litigation, you are the “Master” of the field.

Due to increased regulation and regulatory enforcement, an increasing number of financial crimes, and a record number of bankruptcies and corporate restructurings, the demand for financial litigation and forensic accounting services is set to soar. The Master Analyst in Financial Forensics (MAFF) is designed to help CPAs and other financial service professionals obtain the necessary training, certification, and credibility so they can grow and thrive in these.

Unlike most financial litigation training that tends to be general in scope, MAFF training, continuing education, and related resources provides attendees with an understanding of the professional responsibilities and legal underpinnings necessary to providing credible financial forensics services along with an overview of the highest growth areas of financial forensics practice. The nationally recognized and seasoned financial forensics experts who teach the program also dive into the methodologies and approaches for calculating damages, financial investigative and forensic accounting techniques, skills development for communicating with judges, attorneys, and juries, and practice building strategies that are being employed by successful and emerging financial forensics analysts.

Pathway to the First and Most Respected Financial Litigation Credential: the MAFF

1. Meet the MAFF Prerequisites and Experience Requirements, and Apply for the Designation*

2. Apply for NACVA Membership

3. Attend the Recommended Financial Litigation Consulting Professionals Workshop

4. Pass the MAFF Proctored Exam

5. Maintain Annual NACVA Membership and Comply with Tri-Annual Recertification

Recommended training:
Financial Litigation Consulting Professionals Workshop, see page 6

* Applicants who do not meet the prerequisites and experience requirements can apply for and pursue the credential, and hold the MAFF Candidate Status until the prerequisites and experience requirements are met.
Program Description

Complete and Comprehensive Training on How to Value Private Business Enterprises

The Business Valuation Certification and Training Center (BVTC) is offered via live-classroom instruction in cities throughout the U.S. and internationally, and is also available through live/online web broadcasts and self-study.

The training delivers the most comprehensive and complete foundational training teaching to the international body of knowledge on how to value private business enterprises and prepares attendees to pass any business valuation certification exam offered in the profession:

- Business valuation methodologies, approaches, and case studies
- Professional standards and ethics
- Specialty areas of valuation practice

Understanding and applying the generally accepted business valuation methodologies and approaches, and adhering to professional standards that govern the business valuation profession, will put you in a stronger position to better serve your clients.

What You Will Cover

- Days 1 and 2: Business Valuations—Fundamentals, Techniques & Theory
- Day 3: Business Valuations—Applications and Calculations of the Income and Asset Approaches
- Day 4: The Market Approach—Exploring the Price Component
- Day 5 P.M.: Exam Preparation—CVA Proctored Exam and Peer Reviewed Business Valuation Report (Case Study)
- Day 6: CVA Online Proctored Exam

How You Will Benefit

After attending the training center, attendees will be able to:

- Identify the fundamental steps to valuing a business, from beginning to end
- Identify an appropriate valuation method within the valuation approaches based on the specific purpose and standard of value for a given valuation assignment
- Determine the most appropriate financial analysis of a subject company as it relates to a specific valuation engagement
- Identify the foundations of the business valuation analysis process as well as the value drivers that support a subject company’s value

- Recognize the differences in the various standards of value for businesses and the nuances of their application in a business valuation engagement
- More details online at www.theCTI.com/BVTC

Who Should Attend

CPAs and financial consultants who wish to specialize in a non-seasonal consulting niche; employees of companies whose business plan includes growth/change via acquisitions and/or divestitures; and anyone else who deals with business value in the course of his or her work.
BUSINESS VALUATION CERTIFICATION

To learn more and register or purchase, visit www.theCTI.com/BVTC

4 Case Study Research Package
Critical research components needed to prepare and submit the business valuation report of a subject company—company information, cost of capital, industry data, national and regional economic data, transaction data—are included in this research package.

5 CVA Case Study Mentor
Seasoned and experienced CVA members of NACVA are available to mentor candidates by answering questions and providing guidance on report writing best practices.

6 60-Day Trial Subscriptions to KeyValueData, BVM Pro, and BVRW, Including Technical Support

KeyValueData® —Provides 21 industry databases and resources; the largest selection of any valuation data supplier. See page 44.

Business Valuation Manager™ Pro (BVM Pro), Business Valuation Report Writer™ (BVRW), and Software Coach/Technical Support—These Professional Standards compliant software tools support CVA candidates to successfully complete and submit Part Two of the credentialing requirement: evaluating applied experience. Trial subscription includes coaching and technical support.

Related Training
- Understanding Business Valuations for CPAs/Financial Advisors, see page 16
- Industry Standards and Ethics, see page 11
- Current Update in Valuations, see page 8
- Business Valuation Report Peer Review—Case Analysis in Person/Case Analysis by Webinar, see page 10
- Intermediate Business Valuation Training Center, see page 13
- Advanced Valuation: Applications and Models Workshop, see page 15

A

Business Valuation Certification

Earn Your CVA and Obtain Unlimited CPE with an Ultimate Training and Membership Subscription.
See page 45 for details.

For NASBA-related information on CPE, course timing, faculty, etc., please refer to www.theCTI.com.
Financial Litigation Consulting Professionals Workshop

Co-Sponsored by NACVA

www.theCTI.com/FFF

Program Description

Make the Statement That When it Comes to Financial Litigation, You Are the “Master” of the Field

The highest growth areas in financial litigation are subject to their own variables that define the financial litigation consultant’s role in the matter and the scope of analysis. Further, the legal theories underlying the various types of financial litigation focus on key statutes and case law that define the scope of damages. Command of these fundamental concepts are key to producing credible financial litigation support services that will withstand the challenges of the litigation environment.

The Financial Litigation Consulting Professionals Workshop utilizes state-of-the-art training techniques to maximize learning and retention, teaches to the body of knowledge for financial litigation, and prepares attendees to pass the Master Analyst in Financial Forensics® (MAFF®) proctored exam.

What You Will Cover

- **Day 1:** Foundations of Financial Forensics—Professional Responsibilities and the Legal Environment
- **Day 2:** Damages Analysis and Measurement—Commercial, Personal, and Intellectual Property
- **Day 3:** Business Valuation in Litigation and Family Law Forensics
- **Day 4:** Business Fraud—Prevention, Detection, and Response
- **Day 5:** Bankruptcy, Insolvency, and Reorganization
- **Day 6:** MAFF Proctored Exam

How You Will Benefit

After attending this workshop, attendees will be able to:

- Distinguish between the role of the financial forensics analyst as a testifying and/or consulting expert
- Determine the conceptual types of lost profits, measures of loss, and methods to calculate lost profits
- Distinguish between the different types of specific financial forensics engagements
- Explain the role of the financial forensics analyst in the investigation, standard of care, and determination of damages
- More details online at www.theCTI.com/FFF

Who Should Attend

CPAs, valuation experts, economists, and financial consultants who render services designed to assist in the resolution of legal disputes involving financial matters. Seasoned and less experienced practitioners both have much to gain from this training.

To learn more and register or purchase, visit www.theCTI.com/FFF

### Six-Day Live Classroom Schedule

<table>
<thead>
<tr>
<th>CPE: 40 Hrs</th>
<th>Price: $3,575/$3,250 Members Package (five-day training [Mon–Fri] and MAFF proctored exam [Sat])</th>
<th>Early registration discounts: see page 42</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dates</td>
<td>Locations</td>
<td></td>
</tr>
<tr>
<td>December 10–15</td>
<td>Ft. Lauderdale, FL</td>
<td></td>
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<tr>
<td>June 3–8, 2019</td>
<td>Salt Lake City, UT</td>
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<tr>
<td>September 23–28, 2019</td>
<td>Philadelphia, PA</td>
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<tr>
<td>October 28–November 2, 2019</td>
<td>New Orleans, LA</td>
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<tr>
<td>December 9–14, 2019</td>
<td>Ft. Lauderdale, FL</td>
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Courses (Mon–Fri) generally begin at 8:30 a.m. and conclude at 5:15 p.m. Live classroom courses are paperless, see page 43

### Five-Day Live Online Broadcast Schedule

<table>
<thead>
<tr>
<th>CPE: 40 Hrs</th>
<th>Price: $3,575/$3,250 Members Package (five-day training [Mon–Fri] and MAFF proctored exam scheduled separately)</th>
<th>Early registration discounts: see page 42</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dates</td>
<td>Locations</td>
<td></td>
</tr>
<tr>
<td>December 10–14</td>
<td>Ft. Lauderdale, FL</td>
<td></td>
</tr>
<tr>
<td>September 23–27, 2019</td>
<td>Philadelphia, PA</td>
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<tr>
<td>October 28–November 1, 2019</td>
<td>New Orleans, LA</td>
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</tbody>
</table>

Courses (Mon–Fri) generally begin at 8:30 a.m. and conclude at 5:15 p.m.

### Ten-Day Live Online Webinar Schedule

<table>
<thead>
<tr>
<th>CPE: 30 Hrs</th>
<th>Price: $2,225/$2,045 Members Package (ten-day training [part 1 and part 2] and MAFF proctored exam scheduled separately)</th>
<th>Early registration discounts: see page 42</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dates</td>
<td>Time</td>
<td></td>
</tr>
<tr>
<td>March 4–8, 2019</td>
<td>Monday–Friday, 1:00–4:00 p.m. ET</td>
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<tr>
<td>February 3–7, 2020</td>
<td>Monday–Friday, 1:00–4:00 p.m. ET</td>
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<tr>
<td>March 18–22, 2019</td>
<td>Monday–Friday, 1:00–4:00 p.m. ET</td>
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<tr>
<td>February 24–28, 2020</td>
<td>Monday–Friday, 1:00–4:00 p.m. ET</td>
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</table>

### CPE On-Demand Course

<table>
<thead>
<tr>
<th>CPE: 30 Hrs</th>
<th>Price: $1,756/$1,580.40 Members (includes proctored MAFF certification exam)</th>
</tr>
</thead>
</table>

Call Member/Client Services at (800) 677-2009 or visit theCTI.com.
Global Association of Certified Valuators and Analysts™

NACVA has launched international chapters in Africa, Canada, Europe, India, the Middle East, Taiwan, and Southeast Asia expanding NACVA’s worldwide network and the globally recognized Certified Valuation Analyst® (CVA®) designation.

2018–2019 Training Schedule
European Association of Certified Valuators and Analysts™

Certified Valuation Analyst (CVA) Training Dates and Locations:

December 3–7 (CVA Certification Exam: December 8) ......................................................... Munich, Germany
February 18–22, 2019 (CVA Certification Exam: February 23, 2019) ..................................... Frankfurt, Germany
March 25–29, 2019 (CVA Certification Exam: March 30, 2019) ............................................... Vienna, Austria
May 6–10, 2019 (CVA Certification Exam: May 11, 2019) (taught in English) ......................... Berlin, Germany
June 17–21, 2019 (CVA Certification Exam: June 22, 2019) ................................................... Hamburg, Germany
August 19–23, 2019 (CVA Certification Exam: August 24, 2019) .......................................... Berlin, Germany
November 4–8, 2019 (CVA Certification Exam: November 9, 2018) ........................................ Munich, Germany

To learn more about EACVA training, please visit www.eacva.de. All courses taught in German, unless otherwise noted.

www.GlobalCVA.com

For NASBA-related information on CPE, course timing, faculty, etc., please refer to www.theCTI.com.
Program Description

Essential Updates on Recent Valuation Trends, Techniques, and Opinions

The primary objective of this interactive course is to deliver training and tools for you to produce a strong, defensible work product that will lead to increased confidence in your opinions. The course provides critical education from the foundation up by revisiting the core body of knowledge for business valuations. It promotes active discussion between the instructors and attendees encompassing a wide range of topics, including: practice development, financial statement analysis, cost of capital, valuation approaches, discounts and premiums, federal and state case law, an update on industry and professional standards, calculation and conclusion of value, roles valuators play, and valuation report analysis.

How You Will Benefit

After completing this course, attendees will be able to:

- Determine which state and federal case law precedents guide valuation issues
- Identify changes to tax code, regulations, and court decisions
- Differentiate between a calculation of value and a conclusion of value
- Detect size risk, which is considered throughout the entire business valuation process, so as to avoid duplication of risk associated with size
- Recognize specific considerations in the identification and determination of personal goodwill in business valuations
- More details online at www.theCTI.com/CUV

Who Should Attend

Newly credentialed business valuators who have obtained their valuation certification (CVA, CBA, ABV, ASA, etc.) in the last three years, and those who perform less than five valuations per year interested in advancing their valuation skills and developing new business opportunities.

### One-Day Live Classroom Schedule

<table>
<thead>
<tr>
<th>Dates</th>
<th>Locations</th>
</tr>
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<tbody>
<tr>
<td>December 10</td>
<td>Ft. Lauderdale, FL</td>
</tr>
<tr>
<td>June 5, 2019*</td>
<td>Salt Lake City, UT</td>
</tr>
<tr>
<td>October 28, 2019</td>
<td>New Orleans, LA</td>
</tr>
<tr>
<td>November 18, 2019</td>
<td>San Diego, CA</td>
</tr>
<tr>
<td>December 9, 2019</td>
<td>Ft. Lauderdale, FL</td>
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</tbody>
</table>

* No discounts

<table>
<thead>
<tr>
<th>Dates</th>
<th>Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 28, 2019</td>
<td>Monday, 10:30 a.m.–7:15 p.m. ET</td>
</tr>
<tr>
<td>July 30, 2019</td>
<td>Tuesday, 9:30 a.m.–6:15 p.m. ET</td>
</tr>
<tr>
<td>September 24, 2019</td>
<td>Tuesday, 10:30 a.m.–7:15 p.m. ET</td>
</tr>
<tr>
<td>January 27, 2020</td>
<td>Monday, 9:30 a.m.–6:15 p.m. ET</td>
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<table>
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<tr>
<th>Dates</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 28–31, 2019</td>
<td>Tuesday–Friday, 1:00–3:00 p.m. ET</td>
</tr>
<tr>
<td>August 27–30, 2019</td>
<td>Tuesday–Friday, 1:00–3:00 p.m. ET</td>
</tr>
<tr>
<td>May 26–29, 2020</td>
<td>Tuesday–Friday, 1:00–3:00 p.m. ET</td>
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### Related Training

- **Industry Standards and Ethics**, see page 11
- **Business Valuation Report Peer Review—Case Analysis in Person/Case Analysis by Webinar**, see page 10
Program Description

Writing Quality Valuation Reports: Tips, Techniques, and Good Practices

It is incumbent upon the valuator to fully understand the standards by which his or her valuation report will be judged—readability, credibility, and persuasiveness—the critical elements of the business appraisal review process that make valuation reports much better. *Report Writing: Review and Analysis* is an appealing course structured around the valuation engagement and report writing experiences of the attendees. As their specific issues are addressed, attendees will see examples of how to organize valuation reports, develop an enhanced table of contents, consider alternative formats and structures of reports, examine best practices, and use language that is most suitable to the specific engagement faced by the valuator.

Review standards are fully implemented in the business valuation profession, but few professionals know full-well how to apply them to their own valuation reports. Conventional report writing classes do not delve much into the review process, but is covered in this course.

What You Will Cover

**Day 1:** Introduction to Report Writing and Report Review

**Day 2:** Writing the Appraisal Review Report

How You Will Benefit

After completing this course, attendees will be able to:

- Detect challenges in a formal business oral presentation
- Apply the elements of credible writing to business appraisal reports
- Recognize the features of excellent and problematic business appraisal reports
- Differentiate between scope and findings in an appraisal review report
- More details online at www.theCTI.com/RW

Who Should Attend

Applicants for the Certified Valuation Analyst® (CVA®) designation, and practitioners who hold a business valuation credential, will find the course instrumental in producing their case studies and demonstration reports for accreditation.

Newly credentialed business evaluators who have obtained their valuation certification (CVA, CBA, ABV, ASA, etc.) in the last three years, and those who perform less than five valuations per year interested in advancing their valuation skills and developing new business opportunities.

To learn more and register or purchase, visit www.theCTI.com/RW

### Two-Day Live Classroom Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 19–20, 2019</td>
<td>San Diego, CA</td>
</tr>
</tbody>
</table>

**CPE:** 16 Hrs  
**Price:** $1,300/$1,170 Members

**Early registration discounts:** see page 42

**Courses generally begin at 8:30 a.m. and conclude at 5:15 p.m.**

**Live classroom courses are paperless, see page 43**

### Four-Day Live Online Webinar Schedule

<table>
<thead>
<tr>
<th>Dates</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 14–17, 2019</td>
<td>Monday–Wednesday, 1:00–3:00 p.m. ET</td>
</tr>
<tr>
<td>May 13–16, 2019</td>
<td>Thursday, 1:00–4:00 p.m. ET</td>
</tr>
<tr>
<td>September 16–19, 2019</td>
<td>Monday–Wednesday, 1:00–3:00 p.m. ET</td>
</tr>
<tr>
<td>December 2–5, 2019</td>
<td>Monday–Wednesday, 1:00–3:00 p.m. ET</td>
</tr>
<tr>
<td>January 13–16, 2020</td>
<td>Monday–Wednesday, 1:00–3:00 p.m. ET</td>
</tr>
</tbody>
</table>

**CPE:** 9 Hrs  
**Price:** $650/$585 Members

**Early registration discounts:** see page 42

### CPE On-Demand Course

**CPE:** 9 Hrs  
**Price:** $520/$468 Members

Related Training

- **Industry Standards and Ethics**, see page 11
- **Current Update in Valuations**, see page 8
- **Business Valuation Report Peer Review—Case Analysis in Person/Case Analysis by Webinar**, see page 10
- **Intermediate Business Valuation Training Center**, see page 13
- **Advanced Valuation: Applications and Models Workshop**, see page 15
Program Description

**The Profession’s First and Only Business Valuation Report Peer Review**

The peer review of valuation reports provides authors with perspectives from like-mined valuators. The valuation reports are reviewed and discussed in a round table format with particular emphasis centered on whether or not the critical elements of the valuation report are sufficiently addressed and meet professional standards guidelines, while also identifying strengths and weaknesses of the report relating to overall readability, credibility, and persuasiveness. These interactive sessions are ideal settings to engage in a discussion with your peers about the potential risks to a valuator’s credibility by issuing reports that do not meet professional standards and reporting requirements. Sessions are offered via live-classroom roundtables (CAP) or live online webinars (CAW).

How You Will Benefit

After completing this course, attendees will be able to:

- Recognize the do’s and don’ts of writing an effective report
- Determine techniques that they can take back to the office to use or avoid
- More details online at www.theCTI.com/CAP

Who Should Attend

Newly credentialed business valuators who have obtained their valuation certification (CVA, CBA, ABV, ASA, etc.) in the last three years, and those who perform less than five valuations per year interested in advancing their valuation skills and developing new business opportunities.

Seasoned business valuation practitioners looking to bolster their skills and efficiencies. All practitioners will come away with the skills required to both create and maintain a thriving valuation practice.

Do you have a valuation report you would like reviewed?

Valuators who submit a report for peer review receive:

- Feedback from the peer review session of their report
- Attendance to any CAP or CAW session for free
- An incentive to attend Report Writing: Review and Analysis free or discounted
- Qualify for royalty payments for use of their reports as part of the training sessions
Industry Standards and Ethics

Program Description

Ensure Your Knowledge and Compliance with the Profession’s Standards

Recent developments within the professional organizations are moving toward the harmonization of industry standards. Senior representatives from the valuation industry will discuss the standards impacting the profession, including: NACVA, IBA, ASA, AICPA, and USPAP.

How You Will Benefit

After completing this course, attendees will be able to:

- Determine how industry standards and any changes will impact one’s practice
- Interpret any changes in the current and possibly future environment
- More details online at www.theCTI.com/ISU

Who Should Attend

This course is designed for all business valuation practitioners who wish to understand the principles-based standards developed to provide guidance in performing valuation services.

Related Training

- Current Update in Valuations, see page 8
- Business Valuation Report Peer Review—Case Analysis in Person/Case Analysis by Webinar, see page 10
- Intermediate Business Valuation Training Center, see page 13
- Advanced Valuation: Applications and Models Workshop, see page 15

To learn more and register or purchase, visit www.theCTI.com/ISU

CPE On-Demand Course

CPE: 2 Hrs  |  Price: $200/$180 Members

One-Day Live Classroom Schedule

CPE: 2 Hrs
Price: $250/$225 Members
Early registration discounts: see page 42

Dates  |  Locations
June 5, 2019*  |  Salt Lake City, UT

Courses generally begin at 6:30 a.m. and conclude at 8:15 a.m.
Live classroom courses are paperless, see page 43
* No discounts

One-Day Live Online Broadcast Schedule

CPE: 2 Hrs
Price: $250/$225 Members
Early registration discounts: see page 42

Dates  |  Locations
June 5, 2019*  |  Salt Lake City, UT

Courses generally begin at 6:30 a.m. and conclude at 8:15 a.m.
* No discounts

One-Day Live Online Webinar Schedule

CPE: 2 Hrs
Price: $250/$225 Members
Early registration discounts: see page 42

Dates  |  Time
December 18  |  Tuesday, Noon–2:00 p.m. ET
January 29, 2019  |  Tuesday, Noon–2:00 p.m. ET
July 29, 2019  |  Monday, Noon–2:00 p.m. ET
August 30, 2019  |  Friday, Noon–2:00 p.m. ET
September 23, 2019  |  Monday, Noon–2:00 p.m. ET
October 25, 2019  |  Friday, Noon–2:00 p.m. ET
November 18, 2019  |  Monday, Noon–2:00 p.m. ET
December 6, 2019  |  Friday, Noon–2:00 p.m. ET
January 17, 2020  |  Friday, Noon–2:00 p.m. ET

CPE: 2 Hrs
Price: $250/$225 Members

NEW Discounts for Lack of Marketability (DLOM) Workshop

www.theCTI.com/DLOM | Co-Sponsored by NACVA

Program Description

Simplifying the Process to Increase Your Confidence

The calculation of discounts for lack of marketability (DLOM) can be a complex, confusing task. In this workshop, we will simplify the process and increase confidence in performing calculations by exploring the studies, databases, models, and methods used in the DLOM process.

The main feature of this workshop will be the presentation of the new Valuation Products and Services (VPS) Discount for Lack of Marketability Guide, along with detailed case studies. The new models include the VPS Restricted Stock Study Quintile Calculator (RSQC), which enables the user to adjust for differences in risk/volatility, holding periods, dividends, and Mandelbaum-type factors. The case study will also include a comprehensive look at various calculators, models, and templates.

The workshop will cover an examination of legacy restricted stock benchmark, pre-IPO studies, inspect analytical methods, and several well-known databases, including: FMV Opinions detailed restricted stock database, Pluris detailed restricted stock database, and Valuation Advisors detailed pre-IPO database.

How You Will Benefit

After completing this workshop, attendees will be able to:

- Apply the various option calculators and other models and templates, including: VPS Restricted Stock Study Quintile Calculator (RSQC), Black Scholes/Chaffe Calculator, Finnerty Calculator, Ghaidarov Calculators, Longstaff Calculator, QMDM Template, Quantitative Methods Comparison Template, Illiquidity Premium Calculator, and C Corporation Equivalent Dividend Yield Calculator
- Differentiate among the most well-known restricted stock and pre-IPO databases, including: FMV Opinions, Pluris, and Valuation Advisors
- Compare and contrast the various option pricing models, including: Black-Scholes/Chaffe, Longstaff, Finnerty, and Ghairdarov
- Evaluate various analytical methods, including: Wruck; Hertzel and Smith; Bajaj; Abbott; Ghairdarov; Katsanis; LEAPS; NERA CAPM and Mandelbaum-type analyses
- Assess the IRS DLOM Job Aid—Discount for Lack of Marketability Job Aid for Valuation Professionals
- More details online at www.theCTI.com/DLOM

To learn more and register, visit www.theCTI.com/DLOM

### One-Day Live Classroom Schedule

<table>
<thead>
<tr>
<th>CPE: 8 Hrs</th>
<th>Dates</th>
<th>Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price: $650/$585 Members</td>
<td>December 13</td>
<td>Ft. Lauderdale, FL</td>
</tr>
<tr>
<td>Early registration discounts: see page 42</td>
<td>November 21, 2019</td>
<td>San Diego, CA</td>
</tr>
<tr>
<td></td>
<td>December 12, 2019</td>
<td>Ft. Lauderdale, FL</td>
</tr>
</tbody>
</table>

Courses generally begin at 8:30 a.m. and conclude at 5:15 p.m. Live classroom courses are paperless, see page 43

Required Book: $150/$150 Members—Discount for Lack of Marketability Guide (will be distributed at workshop)

### One-Day Live Online Broadcast Schedule

<table>
<thead>
<tr>
<th>CPE: 8 Hrs</th>
<th>Date</th>
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</thead>
<tbody>
<tr>
<td>Price: $650/$585 Members</td>
<td>November 21, 2019</td>
</tr>
<tr>
<td>Early registration discounts: see page 42</td>
<td>December 12, 2019</td>
</tr>
</tbody>
</table>

Courses generally begin at 8:30 a.m. and conclude at 5:15 p.m.

Required Book: $150/$150 Members—Discount for Lack of Marketability Guide (will be shipped before broadcast)

Who Should Attend

Newly credentialed business valuators who have obtained their valuation certification (CVA, CBA, ABV, ASA, etc.) in the last three years, and those who perform less than five valuations per year interested in advancing their valuation skills and developing new business opportunities.
Program Description

**Essential Training for Valuators Who Perform Less Than Five Valuations a Year**

The *Intermediate Business Valuation Training Center* is designed to expand on theories and methods taught in the *Business Valuation Certification and Training Center*. It provides practical skills, covering all aspects of a typical engagement—from engagement acceptance through report delivery—and provides in-depth coverage of the latest theories as they relate to:

- Valuation approaches
- Reconciliation of values
- Discounts and premiums
- Practice management

What You Will Cover

**Day 1:** Deeper Dive into the Income, Market, and Asset Approaches

**Day 2:** The Asset Approach, Reconciliation of Methods, and a Deeper Dive into Discounts and Premiums

**Day 3:** Practice Management and Intermediate Issues

How You Will Benefit

After completing this course, attendees will be able to:

- Communicate to their client the type and level of service required by the particular engagement
- Manage the business valuation engagement from Engagement Letter through report delivery
- Recognize all theories and reference materials as they relate to the business valuation process
- List practice management best practices to be as efficient as possible
- More details online at [www.theCTI.com/IntBVTC](http://www.theCTI.com/IntBVTC)

Related Training

- *Industry Standards and Ethics*, see page 11
- *Current Update in Valuations*, see page 8
- *Report Writing: Review and Analysis*, see page 9

To learn more and register or purchase, visit [www.theCTI.com/IntBVTC](http://www.theCTI.com/IntBVTC)

**Three-Day Live Classroom Schedule**

<table>
<thead>
<tr>
<th>CPE: 24 Hrs</th>
<th>Dates</th>
<th>Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price: $1,950/$1,755 Members</td>
<td>December 11–13</td>
<td>Ft. Lauderdale, FL</td>
</tr>
<tr>
<td>Early registration discounts: see page 42</td>
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</tbody>
</table>

Dates:
- December 11–13
- November 19–21, 2019
- December 10–12, 2019

Locations:
- Ft. Lauderdale, FL
- San Diego, CA

Courses generally begin at 8:30 a.m. and conclude at 5:15 p.m. Live classroom courses are paperless, see page 43

**Three-Day Live Online Broadcast Schedule**

<table>
<thead>
<tr>
<th>CPE: 24 Hrs</th>
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<th>Locations</th>
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<tbody>
<tr>
<td>Price: $1,950/$1,755 Members</td>
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<tr>
<td>Early registration discounts: see page 42</td>
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</table>

Dates:
- December 11–13
- December 10–12, 2019

**Nine-Day Live Online Webinar Schedule**

<table>
<thead>
<tr>
<th>CPE: 18 Hrs</th>
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<th>Time</th>
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</thead>
<tbody>
<tr>
<td>Price: $1,295/$1,165.50 Members</td>
<td>July 9–12, 2019</td>
<td>Tuesday–Friday, 2:00–4:00 p.m. ET</td>
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<td>Early registration discounts: see page 42</td>
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<table>
<thead>
<tr>
<th>Part 1</th>
<th>July 9–12, 2019</th>
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</thead>
<tbody>
<tr>
<td>Part 2</td>
<td>July 22–26, 2019</td>
</tr>
<tr>
<td>Time</td>
<td>October 22–25, 2019</td>
</tr>
<tr>
<td>Time</td>
<td>November 4–8, 2019</td>
</tr>
</tbody>
</table>

**CPE On-Demand Course**

| CPE: 18 Hrs | Price: $1,035/$931.50 Members |

Who Should Attend

Newly credentialed business valuers who have obtained their valuation certification (CVA, CBA, ABV, ASA, etc.) in the last three years, and those who perform less than five valuations per year interested in advancing their valuation skills and developing new business opportunities.

Seasoned business valuation practitioners looking to bolster their skills and efficiencies. All practitioners will come away with the skills required to both create and maintain a thriving valuation practice.

For NASBA-related information on CPE, course timing, faculty, etc., please refer to [www.theCTI.com](http://www.theCTI.com).
NEW Business Valuation Accelerator Workshop

www.theCTI.com/Accelerator Co-Sponsored by NACVA

Program Description

Practical Training Covering Everything Between Engagement Acceptance to Report Delivery

So you have obtained a valuation certification, but you are still trying to figure out how to successfully and profitably complete your initial engagements. You want help...You need help. And at one time, so did everyone else in your shoes.

The Business Valuation Accelerator Online Webinar Series was created to advance the proficiency you acquired to obtain your valuation credential and provide you with even more practical skills, covering everything between engagement acceptance to report delivery. This online series is a serious program created for ambitious up-and-comers who want to bolster their valuation skills and create a thriving valuation practice.

What You Will Cover

Clinic 1: Engagement Risk, Assessment, Letters of Engagement, and Report Writing Techniques
Clinic 2: Economic and Industry Overview, Income and Asset Approaches, and Report Writing Techniques
Clinic 3: Benchmarking the Subject Company, Discounts and Premiums, and Report Writing Techniques

How You Will Benefit

After completing this workshop, attendees will be able to:
- Scope and budget a valuation project
- Relate the economic and industry outlooks to company risk
- Identify appropriate methods and data sources for developing discount rates
- Research, analyze, and interpret data set forth in various transaction databases
- More details online at www.theCTI.com/Accelerator

Who Should Attend

Newly credentialed business valuators who have obtained their valuation certification (CVA, CBA, ABV, ASA, etc.) in the last three years, and those who perform less than five valuations per year interested in advancing their valuation skills and developing new business opportunities.

Related Training

- Industry Standards and Ethics, see page 11
- Current Update in Valuations, see page 8
- Business Valuation Report Peer Review—Case Analysis in Person/Case Analysis by Webinar, see page 10
- Intermediate Business Valuation Training Center, see page 13
- Advanced Valuation: Applications and Models Workshop, see page 15

To learn more and purchase, visit www.theCTI.com/Accelerator
Program Description

Advanced Level Training Centered Around an In-Depth Case Study and Detailed Report

This workshop is based on the 2017 editions of Jim Hitchner’s *Financial Valuation Applications and Models* and *Financial Valuation Workbook*. The workshop includes an in-depth case study and detailed report which will take you to a new, advanced level of understanding business valuation and provide practical tools, data, and models attendees can use immediately in their practice. Taught by a team of nationally recognized valuation analysts, the instructors collaborate with attendees to share the most effective valuation procedures and real-world applications in the field of financial valuation. The instructors teach the theory, but also demonstrate how to apply the theory and appropriate models.

What You Will Cover

Day 1: Advanced Income Approach, Cost of Capital, and Report Writing

Day 2: Advanced Market Approach, Control Premiums, Report Writing, and Calculations

How You Will Benefit

After completing this workshop, attendees will be able to:

- Prepare a new supportable method for reconciling the use of Duff & Phelps data in the Modified Capital Asset Pricing Model and the Build Up Model
- Avoid mistakes and apply best practices in the Income Approach, including: discount rates, growth rates, normalization adjustments, Capitalized Cash Flow Method, and Discount Cash Flow Method
- Recognize a “biased” valuation, including the use of a “bias scorer” checklist
- Apply business valuation standards, along with the use of calculations, which includes two up-to-date calculation reports
- Use a supportable simple model for valuing S corps
- More details online at www.theCTI.com/AdvVal

Who Should Attend

This is a workshop for seasoned business valuation practitioners. It is recommended for practitioners who have already attended the Intermediate Business Valuation Training Center and/or additional, higher-level courses.

To learn more and register or purchase, visit www.theCTI.com/AdvVal

Two-Day Live Classroom Schedule

<table>
<thead>
<tr>
<th>CPE: 16 Hrs</th>
<th>Locations</th>
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</thead>
<tbody>
<tr>
<td>Dates</td>
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</tr>
<tr>
<td>December 11–12</td>
<td>Ft. Lauderdale, FL</td>
</tr>
<tr>
<td>November 19–20, 2019</td>
<td>San Diego, CA</td>
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<tr>
<td>December 10–11, 2019</td>
<td>Ft. Lauderdale, FL</td>
</tr>
<tr>
<td>Courses generally begin at 8:30 a.m. and conclude at 5:15 p.m.</td>
<td></td>
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<tr>
<td>Live classroom courses are paperless, see page 43</td>
<td></td>
</tr>
</tbody>
</table>

Required Book and Workbook: $175/$175 Members—*Financial Valuation Applications and Models*, fourth edition and *Financial Valuation Workbook*, fourth edition (will be distributed at workshop)

Two-Day Live Online Broadcast Schedule

| CPE: 16 Hrs | |
| Dates        |
| November 19–20, 2019 |
| December 10–11, 2019 |
| Courses generally begin at 8:30 a.m. and conclude at 5:15 p.m. |

Required Book and Workbook: $175/$175 Members—*Financial Valuation Applications and Models*, fourth edition and *Financial Valuation Workbook*, fourth edition (will be shipped before broadcast)

Advanced Discounts and Premiums Self-Study Course

Course Materials Only: $195/$175.50 Members

CPE Exam Price: (11 Hrs CPE) $85/$85 Members

Related Training

- *Discounts for Lack of Marketability (DLOM) Workshop*, see page 12
- *Transaction Advisory Services (TAS) Workshop*, see page 30
- *Advanced Mergers and Acquisitions Workshop*, see page 31
- *Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp*, see page 29
Program Description

**Business Valuation Training Even if You Do Not Intend to Earn a Valuation Credential**

The competitive nature of today’s business climate, combined with the expanding needs of business enterprise, place upon the business advisor daunting challenges to provide the best tax, accounting, and advisory services possible—a challenging task to say the least. They must wear multiple hats, and even if one’s focus is purely tax, accounting, or both, business owners expect counsel on how to improve performance by shaving costs, increasing revenues, and growing company value. Nowadays, it is common knowledge that the most substantial asset in a business owner’s portfolio is likely the business itself. And it stands to reason that growing its value translates into a more comfortable retirement. Every business advisor should have basic training in the fundamentals of valuing business enterprises. Even if you do not intend to specialize in this area, this training is crucial to being a solid and valued business advisor.

This webinar series does not replace any of the requirements for achieving the Certified Valuation Analyst® (CVA®) credential. It will, however, enhance preparation for any valuation credential.

What You Will Cover

**Part 1:** Introduction to Business Valuation and Understanding the Engagement

**Part 2:** Financial Statement Analysis—Getting the Story Behind the Numbers

**Part 3:** Valuation Approaches—The Nuts and Bolts: The Income Approach

**Part 4:** The Completed Transaction and Guideline Public Comparable Methods

**Part 5:** Valuation Discounts and Premiums—The Plusses and Minuses of Value

How You Will Benefit

After completing this course, attendees will be able to:

- Outline the fundamental steps to valuing a business, from beginning to end
- List the cornerstones of the business analysis process or the drivers of company value
- Identify and utilize key resources in order to improve profit margins and grow company value
- Articulate how business valuation can be a valuable consulting service for clients
- More details online at www.theCTI.com/BVFundamentals

Who Should Attend

The ideal candidates for this course are CPAs, PAs, CFOs, business consultants, attorneys, and bankers. Advisors to businesses who have a background in accounting and finance will also benefit greatly.
Valuing Family Limited Partnerships Workshop

www.theCTI.com/FLP | Co-Sponsored by NACVA

Program Description

Valuation of Holding Companies and FLPs: Approaches, Methods, and Discounting

This workshop will introduce attendees to current methodologies and resources relating to the valuation of Family Limited Partnerships (FLPs) and similarly organized asset-holding companies. The workshop will focus on engagements for gift and estate tax as well as income tax planning. Attendees will be introduced to the empirical data, statutes, and case law that will help them form a solid discount conclusion in their valuations.

What You Will Cover

Part 1: Partnership Agreement and Analysis
Part 2: FLP Case Law Overview
Part 3: Empirical Data Overview

How You Will Benefit

After completing this workshop, attendees will be able to:
- Recognize a well-written valuation report of an FLP (or similar estate planning entity)
- Identify the various tax code sections pertinent to these valuations
- Recognize data to support discounts found in these valuations
- More details online at www.theCTI.com/FLP

Who Should Attend

Valuation analysts of all levels, estate and tax attorneys, and estate planners.

Five-Day Live Online Webinar Schedule

<table>
<thead>
<tr>
<th>Dates</th>
<th>Time</th>
<th>CPE: 5 Hrs</th>
<th>Price: $650/$585 Members</th>
<th>Early registration discounts: see page 42</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 13–17, 2019</td>
<td>Monday–Friday, 2:00–3:00 p.m. ET</td>
<td>CPE: 5 Hrs</td>
<td>Price: $650/$585 Members</td>
<td>Early registration discounts: see page 42</td>
</tr>
<tr>
<td>September 16–20, 2019</td>
<td>Monday–Friday, 2:00–3:00 p.m. ET</td>
<td>CPE: 5 Hrs</td>
<td>Price: $650/$585 Members</td>
<td>Early registration discounts: see page 42</td>
</tr>
</tbody>
</table>

CPE On-Demand Course

CPE: 5 Hrs | Price: $520/$468 Members

For NASBA-related information on CPE, course timing, faculty, etc., please refer to www.theCTI.com.
NEW Business Valuation Specialty Training

www.theCTI.com/BVSpecialties  Co-Sponsored by NACVA

Program Description

Business valuation practitioners often find times when they are asked to establish value for a specialized industry. Taught by a worldwide team of seasoned business valuation analysts, this industry specific, on-demand training will give you the confidence to carry out these engagements with the unique methodologies and approaches inherent to these industries.

Our CPE On-Demand Library includes training for these industries and is constantly growing:

- 10 Common Errors in Valuation and How to Address These Issues
- Acid Test for Property Tax Assessment Appeal of Fixtures, Machinery, and Equipment in a Special-Purpose Business
- Advanced Concepts in Risk Analysis
- Buy Sell Agreements—The Business Will (or Won’t)
- CVs and Engagement Letters
- Dealing with Interest Bearing Debt in Valuations
- Grantor Trusts—What Every Practitioner Should Know about IDGTs
- Hot Topics in ESOP Valuations
- Impact of Leases Standard on Business Valuation Metrics
- Intangible Asset Valuation—Illustrative Case Study for Financial Statement Reporting
- Issues on Intangible Assets Recognition Upon Business Combinations
- New Developments and Trends in Car Dealership Valuation
- Normalizing Owner Compensation in Business Valuations
- Oil and Gas: From Rock to Bank
- Overview of U.S. and International Best Practice Efforts
- Placing a Price on Pleasure—Intangible Asset Valuation Considerations for Entertainment and Sports Businesses
- Real Estate and the Business Appraiser
- Secrets of Practice Before the Internal Revenue Service
- Strategies When Working With IRS Appraisers
- Transfer Pricing and Valuing International Entities and Global Intangibles
- Trust and Estates: S Corporation Valuation Issues
- Valuation Interest Rates Swaps
- Valuation Issues of Renewable Energy Interests
- Valuation of Business, Securities, and Intangible Assets for Bankruptcy Purposes
- Valuation of Debt and Preferred Stock
- Valuation of Equity Securities of Privately Held Companies
- Valuation of Family Limited Partnerships
- Valuation of Intangible Assets in the Absence of Positive Net Cash Flows
- Valuing Commercial and Heavy Construction Contractors
- Valuing Complex Debt and Equity Structures
- Valuing Earn-Outs and Other Performance Based Contracts
- Valuing Fast-Food Restaurants
- Valuing Oil and Gas Interests—Identifying and Measuring Risk
- Valuing Pass-Through Entities—Approach Clarity (But Not Consensus)
- Valuing Renewable Interests Issues and Guidelines
- What’s that Mean? Five Principles to Avoid Overvaluing a Company
- What You Can’t See Has Value—The Valuation of Intangible Assets

To learn more and purchase, visit www.theCTI.com/BVSpecialties

CPE On-Demand Courses

CPE: 1 or 2 Hrs  Price: One-Hour Webinars: $80/$72 Members  Two-Hour Webinars: $110/$99 Members
Program Description

Effective Approaches to Writing for Damages Reports and Litigation Matters: Learning from the Masters

In this hands-on workshop, attendees will learn effective approaches to writing an expert damages report for use in a litigation matter. The workshop will include a review of the report writing requirements set forth in the Federal Rules of Civil Procedure and reporting requirements for other jurisdictions. This workshop will also focus on drafting reports with an emphasis on content, language, supporting evidence, exhibits, and professional standards compliance. Attendees will be asked (not required) to submit a redacted expert report to the instructor prior to the date of the class. All arrangements will be made with NACVA Headquarters for this submission.

How You Will Benefit

After completing this workshop, attendees will be able to:
- Identify the reporting requirements set forth in Federal Rules of Civil Procedure 26(a)(2)(B)
- Determine the strengths, weaknesses, and risks of alternative report styles
- Differentiate between a report used for tax or transactional purposes and a report appropriate for the litigation process
- Determine the manner in which foundational evidence is incorporated into an expert report
- Identify the reasons that expert reports are often inadmissible as evidence in court
- More details online at www.theCTI.com/LRW

Who Should Attend

This workshop is designed for all litigation and financial forensic experts who want to improve the quality of their written reports.

Related Training

- Business Valuation Report Peer Review—Case Analysis in Person/Case Analysis by Webinar, see page 10
- Report Writing: Review and Analysis, see page 9

To learn more and register or purchase, visit www.theCTI.com/LRW

One-Day Live Classroom Schedule

CPE: 8 Hrs
Price: $650/$585 Members
Early registration discounts: see page 42

<table>
<thead>
<tr>
<th>Dates</th>
<th>Locations</th>
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<tbody>
<tr>
<td>June 5, 2019*</td>
<td>Salt Lake City, UT</td>
</tr>
<tr>
<td>October 28, 2019</td>
<td>New Orleans, LA</td>
</tr>
<tr>
<td>December 11, 2019</td>
<td>Ft. Lauderdale, FL</td>
</tr>
</tbody>
</table>

Courses generally begin at 8:30 a.m. and conclude at 5:15 p.m. Live classroom courses are paperless, see page 43
* No discounts

Four-Day Live Online Webinar Schedule

CPE: 8 Hrs
Price: $650/$585 Members
Early registration discounts: see page 42

<table>
<thead>
<tr>
<th>Dates</th>
<th>Time</th>
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<tbody>
<tr>
<td>May 6–9, 2019</td>
<td>Monday–Thursday,</td>
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<tr>
<td>July 22–25, 2019</td>
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<td>September 9–12, 2019</td>
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</table>

CPE On-Demand Course

CPE: 8 Hrs  |  Price: $520/$468 Members
Expert Witness Bootcamp

www.theCTI.com/EWB  Co-Sponsored by NACVA

Program Description
The Truth, the Whole Truth, and Nothing But Persuasion™

Each attendee will participate as a testifying and consulting expert in a trial involving financial testimony or family law issues. Attendees will learn the art of delivering effective testimony and how to withstand grueling cross-examination. As consulting experts, attendees will learn how to dissect and critique the reports and opinions of the testifying experts and how to prepare counsel for the expert segments of trial.

Each attendee will be coached and guided by members of our faculty of seasoned experts and trial attorneys. The bootcamp culminates in a courtroom setting during which each program attendee, as a testifying expert, presents and defends his or her own expert opinions on the witness stand.

What You Will Cover

Day 1: The Dynamics of Expert Witnessing—Professional Standards, Expert Reports, and Strategic Planning

Days 2 and 3: The Dynamics of Trial—Direct and Cross Examination

How You Will Benefit

After completing this bootcamp, attendees will be able to:
- Deliver compelling and persuasive testimony at deposition and trial
- Identify and effectively respond to the strategy and tactics used by opposing counsel
- Avoid the mistakes of inexperienced experts
- More details online at www.theCTI.com/EWB

Three-Day Live Classroom Schedule

<table>
<thead>
<tr>
<th>Dates</th>
<th>Locations</th>
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<tbody>
<tr>
<td>December 13–15</td>
<td>Ft. Lauderdale, FL</td>
</tr>
<tr>
<td>June 3–5, 2019</td>
<td>Salt Lake City, UT</td>
</tr>
<tr>
<td>October 29-31, 2019</td>
<td>New Orleans, LA</td>
</tr>
<tr>
<td>December 12–14, 2019</td>
<td>Ft. Lauderdale, FL</td>
</tr>
</tbody>
</table>

Courses generally begin at 8:30 a.m. and conclude at 5:15 p.m. Live classroom courses are paperless, see page 43

Who Should Attend

Professionals in all disciplines who serve as or plan to serve as expert witnesses. Financial experts, doctors, attorneys, insurance professionals, real estate brokers, valuation and appraisal experts, accountants, engineers, scientists, vocational experts, construction experts, educators, psychologists, and other experts who wish to hone their skills as expert witnesses will find this program to be a most valuable experience.

Related Training

- Financial Litigation Consulting Professionals Workshop, see page 6
- The Truth, The Whole Truth—Storytelling and Persuasion, see page 21
NEW The Truth, The Whole Truth—Storytelling and Persuasion

www.theCTI.com/EWStory | Co-Sponsored by NACVA

Program Description

Powerful Expert Testimony Using Proven Storytelling Techniques

As every trial lawyer knows, the best story wins. Stories are the ultimate tools of persuasion. They are the emotional glue that connects you, the expert witness, to the jury. You may be the most skilled, the most educated, and the most respected expert in your discipline, but in the courtroom, this is not enough. To be persuasive you need to frame your direct testimony into a compelling narrative, so that jurors don’t just listen...they care…and they embrace your opinions.

An unfortunate reality is that expert witnesses are often very factual, speak tech talk, and deliver testimony without much flavor. For the expert testimony to be effective, it must be part of a compelling story.

What You Will Cover

Day 1: Telling the Winning Story—Eight Fundamentals of Breakthrough Communications

Day 2: The Courtroom—Cross and Direct: Storytelling in Action

How You Will Benefit

After completing this course, attendees will be able to:

- Utilize techniques to weave the three universal laws of powerful storytelling—conflict, struggle, resolution—into your communications with the jury
- Integrate “left and right brain strategies” to maximize your connection to the jury and maximize your overall effectiveness in litigation
- Implement the communication approaches and dynamics that facilitate credible expert testimony
- Identify strengths and weaknesses in an expert’s analysis and opinions
- Develop direct examination testimony to highlight the strengths and insulate the weaknesses of the expert’s opinions
- Implement testimony approaches to facilitate complex financial, technical, scientific, and other concepts in terms that are compelling persuasive and understandable by the judge and jury

Who Should Attend

Professionals in all disciplines who serve as or plan to serve as expert witnesses. Financial experts, doctors, attorneys, insurance professionals, real estate brokers, valuation and appraisal experts, accountants, engineers, scientists, vocational experts, construction experts, educators, psychologists, and other experts who wish to hone their skills as expert witnesses will find this program to be a most valuable experience.

Two-Day Live Classroom Schedule

<table>
<thead>
<tr>
<th>Dates</th>
<th>Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 19–20, 2019</td>
<td>San Diego, CA</td>
</tr>
</tbody>
</table>

Courses generally begin at 8:30 a.m. and conclude at 5:15 p.m. Live classroom courses are paperless, see page 43

CPE: 16 Hrs
Price: $1,300/$1,170 Members
Early registration discounts: see page 42

To learn more and register, visit www.theCTI.com/EWStory

For NASBA-related information on CPE, course timing, faculty, etc., please refer to www.theCTI.com.
NEW Understanding Financial Litigation for CPAs/Financial Advisors

www.theCTI.com/UnderstandingFL | Co-Sponsored by NACVA

Program Description

Financial Litigation Training Even if You Do Not Intend to Earn a Credential

Due to increased regulation and regulatory enforcement, an increasing number of financial crimes, and a record number of bankruptcies and corporate restructurings, the demand for financial litigation and forensic accounting services is set to soar.

This webinar series is designed to help CPAs and other financial service professionals understand the professional responsibilities and legal underpinnings necessary to providing credible financial forensics services along with an overview of the highest growth areas of financial forensics practice.

This webinar series does not replace any of the requirements for achieving the Master Analyst in Financial Forensics® (MAFF®) credential. It will, however, enhance preparation for any financial litigation credential.

What You Will Cover

Part 1: Professional Responsibilities and the Legal Environment
Part 2: Damages Analysis and Measurement: Commercial, Personal, and Intellectual Property
Part 3: Business Valuation in Litigation and Family Law Forensics
Part 4: Business Fraud—Prevention, Detection, and Response
Part 5: Bankruptcy, Insolvency, and Reorganization

How You Will Benefit

After completing this course, attendees will be able to:

- Explain the responsibilities of practicing in financial forensics
- Relate the legal principles and parameters for damage analysis and measurement for commercial, personal, and intellectual property damages
- Classify the fundamental principles underlying the valuation of business enterprises
- Determine the unique analyses specific to matrimonial disputes
- Define the principles and procedures that may be employed to prevent fraud in the business environment
- Specify the scope of tasks involved in bankruptcy, insolvency, and reorganization engagements

Five-Day Live Online Webinar Schedule

CPE: 10 Hrs
Price: $720/$648 Members
Early registration discounts: see page 42

<table>
<thead>
<tr>
<th>Dates</th>
<th>Time</th>
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<tbody>
<tr>
<td>March 18–22, 2019</td>
<td>Monday–Friday, 2:00–4:00 p.m. ET</td>
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<tr>
<td>August 12–16, 2019</td>
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</tbody>
</table>

One-Day Live Online Introduction to Financial Litigation Webinar Schedule

CPE: 1 Hr
Price: $180/$162 Members

<table>
<thead>
<tr>
<th>Dates</th>
<th>Time</th>
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<tbody>
<tr>
<td>January 22, 2019</td>
<td>Tuesday, 2:30–3:30 p.m. ET</td>
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<tr>
<td>June 11, 2019</td>
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<tr>
<td>July 11, 2019</td>
<td>Thursday, 2:30–3:30 p.m. ET</td>
</tr>
<tr>
<td>October 10, 2019</td>
<td></td>
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</tbody>
</table>

Who Should Attend

CPAs, valuation experts, economists, and other financial professionals who render services designed to assist in the resolution of legal disputes involving financial matters or are interested to move their practice into these areas.

Understanding Financial Litigation—Certificate of Educational Achievement

A Certificate of Educational Achievement (CEA) in Financial Litigation will be awarded to course attendees who successfully complete and pass a short quiz administered at the conclusion of each day.

While the CEA is a valuable recognition of educational achievement that can enhance your professional development, there is no professional or other credential associated with the certificate, and certificate holders may not claim to be certified, licensed, accredited, or registered to engage in a specific occupation or profession.
Financial Litigation Specialty Webinars

www.theCTI.com/FLS  Co-Sponsored by NACVA

SPECIALIZED FINANCIAL LITIGATION

Deep Dives into the Leading Financial Litigation Areas of Practice

Financial Litigation Specialty Webinars

www.theCTI.com/FLS  Co-Sponsored by NACVA

Bankruptcy, Insolvency, and Restructuring
www.theCTI.com/BIR

This specialty track focuses on work that practitioners may be called upon to perform when working in bankruptcy, reorganization, and insolvency. It is structured to provide a solid introduction to the laws, regulations, and administrative aspects of corporate bankruptcy and culminates with forensic financial analysis and the litigation environment relating to corporate bankruptcy, reorganization, and insolvency.

What You Will Cover
Part 1: Services Provided to Distressed Businesses
Part 2: Fraud, Financial Forensics, and Special Investigations
Part 3: Valuation of Distressed Businesses and Plan of Reorganization
Part 4: Avoidance, Reclamation, and Recovery Actions
Part 5: Solvency and Insolvency Testing

To learn more and purchase, visit www.theCTI.com/BIR

Business and Intellectual Property Damages
www.theCTI.com/BIPD

This track focuses on the legal foundations, methodology, best practices, and current trends in business damages and infringement of patents, trademarks, copyrights, and other intellectual property.

What You Will Cover
Part 1: Advanced Concepts in Lost Profits Calculations
Part 2: Special Considerations for Lost Profits Calculations
Part 3: Patent Damages, Part 1
Part 4: Patent Damages, Part 2
Part 5: Trademark and Copyright Damages

To learn more and purchase, visit www.theCTI.com/BIPD

NEW Business Interruptions and Lost Profits
www.theCTI.com/BILP

This specialty track focuses on the foundations and fundamentals of business income and extra expense damages information provided. It includes alternative approaches and methodologies, notable insurance policy sections, foundational evidence and research sources, and reporting guidelines and strategies embraced by the most effective business damages experts.

What You Will Cover
Part 1: Planning the Business Interruption Engagement
Part 2: Business Interruption Policy Differences
Part 3: Period of Restoration
Part 4: Types of Business Interruption Calculations
Part 5: Business Interruption Claim Opportunities

To learn more and register, visit www.theCTI.com/BILP

For NASBA-related information on CPE, course timing, faculty, etc., please refer to www.theCTI.com.
Commercial Damages and Lost Profits

This specialty track focuses on the foundations and fundamentals of business damages measurement, including: alternative approaches and methodologies, notable code sections and case law, foundational evidence and research sources, and reporting guidelines and strategies embraced by the most effective business damages experts.

What You Will Cover

Part 1: Elements of Lost Profits and Introduction to Lost Profits
Part 2: Lost Profits Methods and Procedures, Part 1
Part 3: Lost Profits Methods and Procedures, Part 2
Part 4: Lost Profits Methods and Procedures, Part 3
Part 5: Other Considerations in Lost Profits

To learn more and register or purchase, visit www.theCTI.com/CDLP

Matrimonial Litigation

This specialty track focuses on the entire process of matrimonial litigation support, including: determining support, valuing assets, and distribution of assets. Covered within this arena are valuation of marital assets, including: closely held business and stock options, taxes for divorce and distribution, asset distribution, and practice management issues.

What You Will Cover

Part 1: Fundamentals of Matrimonial Litigation and How We Provide Services
Part 2: Forensic Accounting in Matrimonial Cases
Part 3: Organizing Your Work and Reporting Your Findings
Part 4: Valuation Issues in Matrimonial Engagements
Part 5: Tax Considerations in Divorce

To learn more and register or purchase, visit www.theCTI.com/ML

Fraud Risk Management

This specialty track focuses on a comprehensive understanding of fraud risk management, from identification of an organization’s fraud risk to provision of practical tools to address them. The solutions offered are applicable to entities of any size and structure, from small, privately owned companies to multi-national, publicly held organizations, as well as not-for-profit and governmental/regulatory enterprises.

What You Will Cover

Part 1: Detecting Occupational Fraud
Part 2: Introduction to Fraud Risk Management
Part 3: Fraud Risk Assessment and the Internal Control Framework
Part 4: Fraud Deterrence and Fraud Detection
Part 5: Financial Statement Audits and Interviewing

To learn more and purchase, visit www.theCTI.com/FraudRisk

NEW Personal Injury

This specialty track focuses on the elements and process of calculating damages in cases involving personal injury. Damages covered include: lost earnings or lost economic support, lost benefits, lost future medical expenses, and lost household services. The course focuses on the most recent literature and sources of information on multiple topics in these areas.

What You Will Cover

Part 2: Intro to Personal Injury: Economic Theory, Law, and Finance II
Part 3: Calculating Damages in Personal Injury I
Part 4: Calculating Damages in Personal Injury II
Part 5: Calculating Damages in Personal Injury III

To learn more and register, visit www.theCTI.com/PI

Call Member/Client Services at (800) 677-2009 or visit theCTI.com.
NEW Wrongful Death

This specialty track focuses on the elements and process of calculating damages in cases involving wrongful death. Damages covered include: lost earnings or lost economic support, lost benefits, lost future medical expenses, and lost household services. The course focuses on the most recent literature and sources of information on multiple topics in these areas.

What You Will Cover

Part 2: Intro to Wrongful Death: Economic Theory, Law, and Finance II
Part 3: Calculating Damages in Wrongful Death I
Part 4: Calculating Damages in Wrongful Death II
Part 5: Calculating Damages in Wrongful Death III

To learn more and register, visit www.theCTI.com/WD

Related Training

- Financial Litigation Consulting Professionals Workshop, see page 6
- Litigation Report Writing Workshop, see page 19
- Understanding Financial Litigation for CPAs/Financial Advisors, see page 22

Five-Day Live Online Webinar Schedule

<table>
<thead>
<tr>
<th>CPE: 15 Hrs</th>
<th>Dates</th>
<th>Time: Monday–Friday, 1:00–4:00 p.m. ET</th>
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<tbody>
<tr>
<td>Price: $720/$648 Members</td>
<td>June 24–28, 2019</td>
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</tbody>
</table>

Early registration discounts: see page 42

Pro-Bono Program

Gain National Exposure in the Legal Community
Support economically limited businesses and individuals seeking professional financial, valuation, legal, and forensic services.

Professional Mentoring

Less Experienced Members—Improve the quality and effectiveness of your skills by being paired with a seasoned mentor.
Seasoned Members—Pay it forward.

www.NACVA.com/PBG

For NASBA-related information on CPE, course timing, faculty, etc., please refer to www.theCTI.com.
Forensic Accounting Academy®

Program Description

The Art & Science of Investigating People & Money®

Despite the chronic and compelling need for financial forensics and forensic accounting expertise, the accounting and financial professions have yet to embrace or even offer a cogent and comprehensive forensic accounting tools-based methodology. That deficiency has plagued our economy…until now. The Forensic Accounting Academy® (Academy) is the most all-inclusive training in forensic accounting available to date.

What You Will Cover

Part 1: Foundational Tools—Genogram, Entity/Party, CRO, Indirect Method, Cash-T, APD
Part 2: Advanced Forensic Indices, Forensic Lexicology, Forensic Benefit Streams, Damages, QDE
Part 4: Advanced Forensic Report Writing, Trial Exhibits, Scripting, Depo Matrix
Part 5: Advanced Technical Analysis, Gott’s Principle, Central Limits, Wigmorean Charts

How You Will Benefit

After completing this academy, attendees will be able to:

- Establish financial forensics/forensic accounting as the financial “supra” discipline
- Differentiate forensic accounting from mere “fraud” analysis
- Determine appropriate methods and tools for interviewing, interrogation, and behavior detection skills

Who Should Attend

The Academy content is designed for both financial and non-financial professionals who require sophisticated investigative and analytical skills to stay abreast of increasing civil and criminal wrongdoer treachery.

Forensic Accounting Specialty Webinars

Three-Day Live Online Webinar Schedule

CPE: 6 Hrs
Price: $486/$437.40 Members
Early registration discounts: see page 42

Forensic Accounting for Business Valuation
January 22–24, 2019 Tuesday–Thursday, 1:00–3:00 p.m. ET
May 29–31, 2019 Wednesday–Friday, 1:00–3:00 p.m. ET
August 13–15, 2019 Tuesday–Thursday, 1:00–3:00 p.m. ET

Forensic Accounting for Matrimonial Litigation
July 23–25, 2019 Tuesday–Thursday, 1:00–3:00 p.m. ET
September 4–6, 2019 Wednesday–Friday, 1:00–3:00 p.m. ET

Forensic Accounting for Commercial Damages and Lost Profits
September 17–19, 2019 Tuesday–Thursday, 1:00–3:00 p.m. ET

Forensic Accounting for Personal Injury and Wrongful Death
March 19–21, 2019 Tuesday–Thursday, 1:00–3:00 p.m. ET

Forensic Accounting for Bankruptcy, Insolvency, and Restructuring
November 5–7, 2019 Tuesday–Thursday, 1:00–3:00 p.m. ET
Behavioral Forensics Academy™

www.theCTI.com/BFA  Co-Sponsored by NACVA and The Behavioral Forensics Group

Program Description

Practical insights on the psychology of white-collar criminals—and how to outsmart them.

For the first time ever, take an inside look at the mind of the fraudster. The two-day Behavioral Forensics Academy™ will bridge the interdisciplinary nature of the ecology of fraud and discuss the psychology of the “sharks” (predatory fraudsters who may exhibit “dark triad” personality characteristics), the psychology of the “marks” (the victims, especially because fraud is a trust crime in which the victim willingly parts with something of value; there is no coercion necessarily), and even the psychology of the “larks” (the whistleblowers who sing about corporate misdeeds as is becoming increasingly common).

The Academy is developed and taught by The Behavioral Forensics Group comprised of two veteran FBI agents, a former accounting firm partner and ex-PCAOB’s Standing Advisory Group member with a PhD in psychology, and a Board-certified organizational psychiatrist who have written the prize-winning book, A.B.C.’s of Behavioral Forensics: Applying Psychology to Financial Fraud Prevention and Detection (John Wiley & Sons, 2013).

What You Will Cover

Day 1: Common Behavior Risk Factors in High-Profile C Suite Crimes
Day 2: Investigation of Fraud Based on Psychology

How You Will Benefit

After completing this academy, attendees will be able to:
- Identify where to look for signals of behavioral/integrity risks, psychological influences to commit fraud, as well as the ABC taxonomy (bad apple, bushel, crop) and its implications
- Describe the psychology of the sharks (predatory fraudsters), the marks (the victims), and the larks (whistleblowers willing to talk)
- Recommend fraud mitigation steps based on psychological factors of influence
- Assist with the investigation of fraud cases from a psychology perspective, including behavioral forensics-inspired interviewing
- Interview perpetrators, victims, and witnesses/whistleblowers based on psychological insights

To learn more and register, visit www.theCTI.com/BFA

Two-Day Live Classroom Schedule

<table>
<thead>
<tr>
<th>CPE: 16 Hrs</th>
<th>Dates</th>
<th>Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>November 21–22, 2019</td>
<td>San Diego, CA</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Price:</th>
<th>Courses generally begin at 8:30 a.m. and conclude at 5:15 p.m.</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,300/$1,170 Members</td>
<td>Live classroom courses are paperless, see page 43</td>
</tr>
</tbody>
</table>

| Early registration discounts: see page 42 |

Required Book: $45/$45 Members—A.B.C.’s of Behavioral Forensics: Applying Psychology to Financial Fraud Prevention and Detection (will be distributed at academy)

Who Should Attend

This course is ideal for MAFFs, CFFs, CFEs, CPAs, governmental and internal auditors, law enforcement (federal, state, local), regulators, investigators, attorneys, prosecutors, business advisors, bankers, board members and other fiduciaries, and business owners—in short, those who may not necessarily focus their practice on financial/computer forensics, yet want to understand the applicability of behavioral forensics as a discipline relevant to their pursuits.

For NASBA-related information on CPE, course timing, faculty, etc., please refer to www.theCTI.com.
CoreValue® Software

CoreValue, the #1 Best-Selling Business Consulting Software System

Problem:
You want to grow your existing consulting practice, or branch out and provide business consulting services—but you don’t know how.

The FOUR main reasons you should consider CoreValue:

1. Discover the BEST methodology—developed at MIT. When starting or standardizing your consulting practice, you want the absolute BEST practices and methodology—so even your newest consultant produces accurate recommendations.

2. See how to produce excellent RESULTS. Generate the MOST accurate assessment, the BEST reports, identify the MOST engagement opportunities, and show client ROI for your services.

3. Find an easy and proven SYSTEM to get started fast. Includes a detailed discovery survey, a deep dive analysis (based on market comps), and a system to generate a master plan of action.

4. Learn how you can MARKET your practice like a pro. Includes templates, sample messaging, SEO, direct response, collateral, and numerous “lead machines” for workshops and more—everything needed to jump start your practice.

CoreValue Software License Options

CoreValue Pro Advisor
Package Includes: Unlimited Discover Reports, online marketing and consulting resources with limited support. An additional fee of $495 per client is required for each Unlock Deep Analysis and Executable Growth Plan.

CoreValue Advisor Unlimited
Package Includes: Unlimited Discover Reports, Unlimited Unlock Deep Analysis, Unlimited Executable Growth Plan, Unlimited Discover Workshops, Discover Analytics, program set-up, 90-day mentoring support, local SEO optimization, and a complete marketing and sales system.

Special Offer! Purchase CoreValue Advisor Unlimited within 30 days of attending the CoreValue Bootcamp, and apply the full cost of training as a discount.

Pricing

| CoreValue Pro Advisor | $995 |
| CoreValue Advisor Unlimited | $2,950 |

Prices are for a single advisor per year.
NEW Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp

www.theCTI.com/CoreValue | Co-Sponsored by CoreValue Software, ValuSource, and NACVA

Program Description

Build a Thriving Consulting Practice
The *Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp* is designed for professionals who are starting or expanding their business consulting practice. This bootcamp is designed for professionals who do not use a business consulting system to find new clients, win new engagements, or to manage projects or multi-year engagements. It is designed to help individuals analyze the best way to start or expand their business consulting practice.

What You Will Cover

Part 1: Discover Report—Your Lead Machine
Part 2: CoreValue Unlock—Deep-Dive Analysis and Executable Growth Plan
Part 3: Unlock Case Study—Manufacturing
Part 4: Unlock Case Study—Professional Services Company
Part 5: How to Create a Thriving Consulting Practice

How You Will Benefit

After completing this bootcamp, attendees will be able to:

- Analyze a business enterprise with easily obtained key metrics
- Translate a detailed report which looks at 18 areas that drive value
- Produce intelligent reports showing where to focus and prioritize energies growing company value
- Determine a value score benchmark which compares your client company to thousands of similar companies that have sold, giving weight to certain company-specific metrics. This benchmark is the key metric you will share with your client to show the progress of your ongoing value-building service.

Who Should Attend

This bootcamp is designed for CoreValue software users and for practitioners who are interested in starting or growing their business consulting practice. Suggested pre-requisite is the CoreValue Orientation Video available at www.theCTI.com/CoreValue.

To learn more and register, visit www.theCTI.com/CoreValue

Two-Day Live Classroom Schedule

<table>
<thead>
<tr>
<th>CPE: 16 Hrs</th>
<th>Dates</th>
<th>Locations</th>
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<tbody>
<tr>
<td>Price: $1,300/$1,170 Members</td>
<td>June 3–4, 2019</td>
<td>Salt Lake City, UT</td>
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<tr>
<td>Early registration discounts: see page 42</td>
<td>November 19–20, 2019</td>
<td>San Diego, CA</td>
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<tr>
<td></td>
<td>December 12–13, 2019</td>
<td>Ft. Lauderdale, FL</td>
</tr>
</tbody>
</table>

Courses generally begin at 8:30 a.m. and conclude at 5:15 p.m.
Live classroom courses are paperless, see page 43

Two-Day Live Online Broadcast Schedule

<table>
<thead>
<tr>
<th>CPE: 16 Hrs</th>
<th>Dates</th>
<th>Locations</th>
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<td>Price: $1,300/$1,170 Members</td>
<td>June 3–4, 2019</td>
<td>December 12–13, 2019</td>
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</table>

Courses generally begin at 8:30 a.m. and conclude at 5:15 p.m.

Five-Day Live Online Webinar Schedule

<table>
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<th>CPE: 10 Hrs</th>
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<tbody>
<tr>
<td>Price: $720/$648 Members</td>
<td>December 3–7</td>
<td>Monday–Friday, 1:00 p.m.–3:00 p.m. ET</td>
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<tr>
<td></td>
<td>January 7–11, 2019</td>
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<td>February 4–8, 2019</td>
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<td>March 25–29, 2019</td>
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One-Day Live Online Orientation Webinar Schedule

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<tr>
<td>Price: $180/$162 Members</td>
<td>February 15, 2019</td>
<td>Friday, 2:00–3:00 p.m. ET</td>
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<td></td>
<td>May 2, 2019</td>
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<tr>
<td></td>
<td>July 18, 2019</td>
<td>Thursday, 2:00–3:00 p.m. ET</td>
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<td></td>
<td>October 3, 2019</td>
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For NASBA-related information on CPE, course timing, faculty, etc., please refer to www.theCTI.com.
Transaction Advisory Services (TAS) Workshop

www.theCTI.com/TAS | Co-Sponsored by NACVA

Program Description

Strategies and Tools to Grow, Enhance, Harvest, and Protect Your Client’s Company Value

This workshop has been designed to provide attendees with the practical knowledge, strategies, and tools to assist their clients—whether internal or external—on how to grow, optimize, and protect their company’s value, and position them for a successful exit. This workshop shifts the emphasis of previous mergers and acquisitions (M&A) training programs from transaction-centric to shareholder value-centric where the M&A transaction is a “means to an end” rather than the “end” itself. It also explores how changing regulations are reshaping the middle-market M&A environment and provides corporate advisers, such as consulting practices and CPA firms, a systematic approach to grow revenues and differentiate their service offering.

What You Will Cover

Day 1: Growing Value Strategies
Day 2: Enhancing Value Strategies
Day 3: Protecting Value Strategies

How You Will Benefit

After completing this workshop, attendees will be able to:

- Describe the main steps and strategies involved in the buy-side M&A process
- Identify the issues involved in M&A valuation (price vs. value)
- Identify key strategies to grow and enhance shareholder value, including how to structure, finance, and optimize corporate growth
- Differentiate between the various tax and legal strategic issues associated with protecting shareholder value from corporate formation to post-deal situations

To learn more and register or purchase, visit www.theCTI.com/TAS

Three-Day Live Classroom Schedule

<table>
<thead>
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<td>Early registration discounts:</td>
<td>November 19–21, 2019</td>
<td>San Diego, CA</td>
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<tr>
<td></td>
<td>December 10–12, 2019</td>
<td>Ft. Lauderdale, FL</td>
</tr>
</tbody>
</table>

Courses generally begin at 8:30 a.m. and conclude at 5:15 p.m. Live classroom courses are paperless, see page 43

CPE On-Demand Related Courses

Grouped into three broad categories, these on-demand courses are presented in a series of five webinars on a different level of expertise.

<table>
<thead>
<tr>
<th>Fundamentals: CPE: 5 Hrs</th>
<th>Intermediate: CPE: 6 Hrs</th>
<th>Advanced: CPE: 5 Hrs</th>
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<tbody>
<tr>
<td>Price: $575/$517.50 Members</td>
<td>Price: $575/$517.50 Members</td>
<td>Price: $575/$517.50 Members</td>
</tr>
</tbody>
</table>

- Articulate the potential implications of monetizing shareholder value and identify the strategies most conducive to successful outcomes
- More details online at www.theCTI.com/TAS

Who Should Attend

CPAs, M&A advisors, investment and financial analysts, investment bankers, financial officers, CEOs, and CFOs.

Transaction Advisory Services—Certificate of Educational Achievement

A Certificate of Educational Achievement (CEA) in Transaction Advisory Services will be awarded to workshop attendees who successfully complete and pass a short quiz administered at the conclusion of each day.

While the CEA is a valuable recognition of educational achievement that can enhance your professional development, there is no professional or other credential associated with the certificate, and certificate holders may not claim to be certified, licensed, accredited, or registered to engage in a specific occupation or profession.
Advanced Mergers and Acquisitions Workshop

www.theCTI.com/AdvMA | Co-Sponsored by NACVA

Program Description

Advanced Topics in Middle Market M&A

This workshop has been designed to provide attendees with an in-depth view of advanced topics in middle market mergers and acquisitions through a combination of class presentations, attendee discussions, and case studies. The workshop focuses on providing a hands-on approach to the analysis and implementation of the foremost strategies used by middle market investment bankers in the areas of capital formation, leveraged buyouts, deal structuring, post-merger integration, and corporate restructurings.

What You Will Cover

Part 1: Raising Private Equity, Engineering an Exit, and Deal Structuring
Part 2: Key M&A Documents, Restructurings and Turnarounds, and Post-Merger Integration

How You Will Benefit

After completing this workshop, attendees will be able to:

- Differentiate between the key characteristics and uses of equity capital and subordinated debt financings
- Define and negotiate the key clauses in M&A documents
- Identify the most suitable deal structuring strategies (tax and financial)
- Recognize the main elements of a post-merger integration plan

To learn more and register, visit www.theCTI.com/AdvMA

Four-Day Live Online Webinar Schedule

<table>
<thead>
<tr>
<th>Dates</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part 1</td>
<td>February 4–7, 2019</td>
</tr>
<tr>
<td></td>
<td>August 5–8, 2019</td>
</tr>
<tr>
<td>Part 2</td>
<td>February 25–28, 2019</td>
</tr>
<tr>
<td></td>
<td>August 19–22, 2019</td>
</tr>
</tbody>
</table>

CPE: 8 Hrs
Price: $612/$550.80 Members
Early registration discounts: see page 42

- Evaluate and design stabilization and turnaround plans involving financial distress situations
- More details online at www.theCTI.com/AdvMA

Related Training

- Advanced Valuation: Applications and Models Workshop, see page 15

Who Should Attend

This workshop is appropriate for CPAs, M&A advisors, investment and financial analysts, investment bankers, financial officers, CEOs, CFOs, and other seasoned professionals with specialized knowledge in the subject area.

For NASBA-related information on CPE, course timing, faculty, etc., please refer to www.theCTI.com.
This session will discuss the various aspects of the tax reform legislation, the Tax Cuts & Jobs Act of 2017, as relates to both healthcare providers, especially non-profit organizations (e.g., new excise taxes for physician executives, and how to structure compensation plans to address these new thresholds) and patients (e.g., abolition of the Individual Mandate tax penalty). The session will also review the current state of healthcare reform in the wake of the tax reform law.

Co-Sponsored by Institute for Healthcare Valuation, Health Capital Consultants, and NACVA

For details and to register, please visit www.theCTI.com/Healthcare
Certified Exit Planning Advisor (CEPA) Credentialing Program

Program Description

Advance Your Exit Planning Practice

Certified Exit Planning Advisor (CEPA) credential holders are part of an established global network of professional advisors who have successfully completed an executive MBA-style program taught by nationally recognized experts in their respective fields. The CEPA program is based on the Valuation Acceleration Methodology™, an exit planning management system that clearly communicates a process and uses the five stages of value maturity to ensure a successful transition. Attending professional advisors are provided with an innovative learning experience and performance-enhancing products, tools, and research that will advance their skills and exit planning practice.

How You Will Benefit

After completing this course, attendees will be able to:

- Recognize the major steps in the exit planning process from the five principal components of an exit plan
- Identify how estate planning can affect the overall financial plan of the owner
- Detect when an asset sale or stock sale is more appropriate for the parties
- Determine the most effective ways to market exit planning services to business owners
- Differentiate between the three approaches to value and know when to use or not use them
- More details online at www.theCTI.com/CEPA

What You Will Cover

**Day 1:** The Overall Need for Exit Planning and Review of the Exit Planning Process; Exit Planning Deliverables, Teams, and Developing Goals and Objectives; Planning for Post-Ownership Life

**Day 2:** Financial Planning for Business Owners, Estate Planning, and the Integration of Charitable Intent; Basics of Business Valuations; Value Enhancement

**Day 3:** Business Valuation Case Study and the Creation of Action Plans; Delivering Action Plans, Analyzing Exit Options and ESOPs as an Exit Strategy

**Day 4:** Understanding Third-Party Sales and the M&A Process; Understanding Private Equity; Family Transitions

To learn more and register, visit www.theCTI.com/CEPA

Four-Day Live Classroom Schedule

<table>
<thead>
<tr>
<th>Dates</th>
<th>Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>February 11–14, 2019</td>
<td>Dallas, TX</td>
</tr>
<tr>
<td>April 1–4, 2019</td>
<td>Phoenix, AZ</td>
</tr>
</tbody>
</table>

Courses generally begin at 8:00 a.m. and conclude at 5:00 p.m.

CPE: 32.5 Hrs

Price:

- $4,700/$4,230 Members
- Package (four-day training [Mon–Thu]; CEPA proctored exam is an online exam)

Early registration discounts:

- $3,995/$3,595 Members for Feb. dates if paid by Dec. 31; and for Apr. dates if paid by Feb. 28

Who Should Attend

Valuation practitioners, CPAs, accountants, business advisors, controllers, CEOs, CFOs, financial advisors, attorneys, estate planners, wealth managers, investment bankers, business brokers, insurance professionals, M&A advisors, and commercial lenders.

Related Training

- **Transaction Advisory Services (TAS) Workshop**, see page 30
- **Build a Thriving Business Consulting Practice—The CoreValue® Bootcamp**, see page 29
# Financial Valuation SuperConference

**December 10–12, 2018**  
Westin Beach Resort | Ft. Lauderdale, FL

Business Valuation, Financial Litigation, Healthcare Valuation, Exit Strategies, Mergers and Acquisitions, and Transaction Advisory Services

## Daily SuperConference Registration Fee
(live or online broadcast):

- **Members (per day)**: $585
- **Non-Members (per day)**: $650

## Monday 12/10

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
</table>
| 8:30 a.m.–5:15 p.m. | NACVA Recertification  
  8 Hrs CPE | Current Update in Valuations (CUV) |

## Tuesday 12/11

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
</table>
| 8:00–9:40 a.m. | Keynote: Marketing Not Working? Here is How to Fix It  
  Lee Frederiksen |
| 10:00 a.m.–12:30 p.m. | WACC—Wacky or Necessary?  
  Chris Hamilton, Mark Kucik  
  Update—Business Divorce Litigation Current Trends  
  Hubert Klein, Nicholas San Filippo, IV  
  Healthcare Valuation—A Healthcare Reform Update  
  Jessica Bailey, Todd Zigrang |
| 1:30–3:10 p.m. | What I’ve Learned from Tax Court and IRS Gift and Estate Tax Audits  
  Bruce Johnson  
  An Overview of Damages and the Role of the Damages Expert in Intellectual Property  
  Richard Eichman  
  Forensic Case Studies—Valuation and Litigation©  
  Darrell D. Dorrell |
| 3:30–5:10 p.m. | Avoiding “Unintentional Bias” in Your Valuation  
  Marc Bello  
  Calculating the Business Interruption Claim  
  Kerrie Merrifield  
  Mergers and Acquisitions—Planning Strategies and Issue Management  
  William E. Offutt, III |

## Wednesday 12/12

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
</table>
| 8:00–9:40 a.m. | Keynote: ICOs, Blockchain, and the Internet of Value—The New Capital Market for Consultants  
  Lorenzo Carver |
| 10:00 a.m.–12:30 p.m. | Valuations of Franchise Businesses—  
  Fast Food is Not Fast Food  
  Rick Gray  
  Modeling and Discounting Damages—Ten Challenging Questions and Answers  
  Mark Hayden  
  Estimating the Economic Losses of the Self Employed—Lost Profits or Lost Earning Capacity  
  Allyn Needham |
| 1:30–3:10 p.m. | The Best of the Best Engagement Letters  
  Glenn Block  
  Basic Divorce Taxation Including Changes Made Under the December 2017 Tax Cuts and Jobs Act  
  Jeff Urbach  
  Expanding Services and Client Retention Using CoreValue  
  George Sandmann |
| 3:30–5:10 p.m. | Electing Appropriate DLOM Models  
  Ashok Abbott  
  Expert Witnesses—Where Truth and Advocacy Collide  
  Michael Kaplan  
  Estate Planning in a Topsy Turvy Environment  
  Eido Walny |

**Note:** Broadcasted sessions are subject to change.

To learn more and register, please visit [www.NACVANation.com](http://www.NACVANation.com) or call Member/Client Services at (800) 677-2009.
NACVA and the CTI’s

2019 Annual Consultants’ Conference

June 6–8, 2019   |   The Grand America Hotel   |   Salt Lake City, UT USA

Change, Challenge, Opportunity
—Your Journey to the Top

Full Conference Registration Fees

Live In-Person OR Live Online Broadcast (includes up to 26 hours of CPE):

$1,575   |   $1,745

Members   |   Non-Members

Early Registration Discounts Available!

$300 if registered by 11/30/18   |   $250 if registered by 12/31/18

Additional early registration discounts available in 2019. Multiple-attendee discounts also available. Early registration and multiple-attendee discounts apply only to full Conference registration, not daily online broadcasts.

Daily Live Online Broadcast Registration Fees (includes CPE):

Conference Day 1 and Day 2 (up to 10 hours of CPE per day):

$655   |   $725

Members (Per day)   |   Non-Members (Per day)

Conference Day 3 (up to 6 hours of CPE):

$330   |   $365

Members   |   Non-Members

To learn more and register, visit AnnualConsultantsConference.com, or call Member/Client Services at (800) 677-2009.

For NASBA-related information on CPE, course timing, faculty, etc., please refer to www.theCTI.com.
Financial Valuation SuperConference

December 10–11, 2019  |  Ft. Lauderdale, FL

Business Valuation, Financial Litigation, Healthcare Valuation, Exit Strategies, Mergers and Acquisitions, and Transaction Advisory Services

Daily SuperConference Registration Fee (live or online broadcast):

<table>
<thead>
<tr>
<th></th>
<th>Members (per day)</th>
<th>Non-Members (per day)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$585</td>
<td>$650</td>
</tr>
</tbody>
</table>

Early Registration Discounts Available!

|                      | 10% if registered by 10/31/19 | 5% if registered by 11/30/19 |

Financial Consultants’ Accelerated Training Institute

October 28–November 2, 2019  |  New Orleans, LA


Early Registration Discounts Available!

|                      | 10% if registered by 8/31/19 | 5% if registered by 9/30/19 |

November 18–23, 2019  |  San Diego, CA


Early Registration Discounts Available!

|                      | 10% if registered by 9/30/19 | 5% if registered by 10/31/19 |

To learn more and register, visit www.theCTI.com or call Member/Client Services at (800) 677-2009.
To support you, we have assembled a team of industry experts who will be covering the profession’s leading publications and delivering in an online, interactive webcast all you need to know so that at all times, you can be confident that your knowledge is current and accurate as you navigate “Around the Valuation World!”

For NASBA-related information on CPE, course timing, faculty, etc., please refer to www.theCTI.com.
## 2018–2020 Online Training Schedule

<table>
<thead>
<tr>
<th>Event Description</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advanced Mergers and Acquisitions Workshop</strong> (see page 31)</td>
<td><strong>Part 1</strong> February 4–7, 2019&lt;br&gt;August 5–8, 2019 <strong>Part 2</strong> February 25–28, 2019&lt;br&gt;August 19–22, 2019</td>
</tr>
<tr>
<td><strong>Advanced Valuation: Applications and Models Workshop</strong> (see page 15)</td>
<td>November 19–20, 2019&lt;br&gt;December 10–11, 2019</td>
</tr>
<tr>
<td><strong>Business Interruptions and Lost Profits</strong> (see page 23)</td>
<td>January 14–18, 2019&lt;br&gt;June 17–21, 2019 October 14–18, 2019</td>
</tr>
<tr>
<td><strong>Case Analysis by Webinar</strong> (see page 10)</td>
<td>December 18&lt;br&gt;January 29, 2019&lt;br&gt;June 4, 2019&lt;br&gt;July 29, 2019&lt;br&gt;August 30, 2019 September 23, 2019&lt;br&gt;October 25, 2019&lt;br&gt;November 18, 2019&lt;br&gt;December 6, 2019&lt;br&gt;January 17, 2020</td>
</tr>
<tr>
<td><strong>Commercial Damages and Lost Profits</strong> (see page 24)</td>
<td>February 18–22, 2019 July 15–19, 2019</td>
</tr>
<tr>
<td><strong>Conferences</strong> (see pages 34–36)</td>
<td>Financial Valuation SuperConference December 11–12&lt;br&gt;Annual Consultants’ Conference June 6–8, 2019&lt;br&gt;Financial Valuation SuperConference December 10–11, 2019</td>
</tr>
<tr>
<td><strong>CoreValue Orientation Webinar</strong> (see page 29)</td>
<td>February 15, 2019&lt;br&gt;May 2, 2019 July 18, 2019&lt;br&gt;October 3, 2019</td>
</tr>
<tr>
<td><strong>Discounts for Lack of Marketability (DLOM) Workshop</strong> (see page 12)</td>
<td>November 21, 2019&lt;br&gt;December 12, 2019</td>
</tr>
<tr>
<td><strong>EconAssist™ Orientation Webinar</strong> (see <a href="http://www.NACVA.com/EconAssist">www.NACVA.com/EconAssist</a>)</td>
<td>January 11, 2019&lt;br&gt;February 22, 2019&lt;br&gt;May 16, 2019 August 22, 2019&lt;br&gt;November 7, 2019</td>
</tr>
<tr>
<td><strong>Forensic Accounting for Bankruptcy, Insolvency, and Restructuring</strong> (see page 26)</td>
<td>November 5–7, 2019</td>
</tr>
<tr>
<td><strong>Forensic Accounting for Business Valuation</strong> (see page 26)</td>
<td>January 22–24, 2019&lt;br&gt;May 29–31, 2019 August 13–15, 2019</td>
</tr>
<tr>
<td><strong>Forensic Accounting for Commercial Damages and Lost Profits</strong> (see page 26)</td>
<td>September 17–19, 2019</td>
</tr>
<tr>
<td><strong>Forensic Accounting for Matrimonial Litigation</strong> (see page 26)</td>
<td>July 23–25, 2019&lt;br&gt;September 4–6, 2019</td>
</tr>
<tr>
<td><strong>Forensic Accounting for Personal Injury and Wrongful Death</strong> (see page 26)</td>
<td>March 19–21, 2019</td>
</tr>
</tbody>
</table>

Note: Dates and titles are subject to change.

Broadcast from a live training event

* These programs are recommended for NACVA Recertification and qualify for NACVA Recertification Bonus Points.
### Software and Database Webinars

**20 Valuation Databases and Resources in 60 Minutes**  
(see www.theCTI.com/DataResourcesWeb)  
August 23, 2019

**Better Financial Statement Benchmarking with RMA Valuation Edition**  
(see www.theCTI.com/RMAValuationWeb)  
October 18, 2019

**BVM Pro: Why This Software Works**  
(see www.theCTI.com/BVMProWeb)  
January 25, 2019

**Comparable Market Data Source Tips and Tricks**  
(see www.theCTI.com/DataSourceWeb)  
May 10, 2019  
September 20, 2019

**Duff & Phelps Navigator Best Practices**  
(see www.theCTI.com.NavigatorWeb)  
November 8, 2019

**KeyValueData® Guideline Data Best Practices**  
(see www.theCTI.com/GuidelineDataWeb)  
July 26, 2019

**Using BVM Pro in the Real World**  
(see www.theCTI.com/BVMProRealWeb)  
December 6, 2019

**Using Damages Advocate for Personal Injury, Wrongful Death, and Employment Law Damages Calculations**  
(see www.theCTI.com/DamagesWeb)  
May 17, 2019  
September 13, 2019

### Understanding Business Valuations for CPAs/Financial Advisors

**Introduction to Business Valuation**  
(see page 16)  
January 22, 2019  
June 11, 2019

**Introduction to Financial Litigation**  
(see page 22)  
January 22, 2019  
June 11, 2019

***Litigation Report Writing Workshop**  
(see page 19)  
May 6–9, 2019  
July 22–25, 2019

**Matrimonial Litigation**  
(see page 24)  
March 11–15, 2019  
August 5–9, 2019

**Personal Injury**  
(see page 24)  
June 17–21, 2019

**Report Writing: Review and Analysis**  
(see page 9)  
January 14–17, 2019  
May 13–16, 2019  
September 16–19, 2019

**Understanding Business Valuations for CPAs/Financial Advisors**  
(see page 16)  
January 7–11, 2019  
June 24–28, 2019  
August 5–9, 2019

**Understanding Financial Litigation for CPAs/Financial Advisors**  
(see page 22)  
March 18-22, 2019  
August 12-16, 2019

**Valuing Family Limited Partnerships Workshop**  
(see page 17)  
May 13–17, 2019  
September 16–20, 2019

**Wrongful Death**  
(see page 25)  
June 24–28, 2019

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*Note: Dates and titles are subject to change.*

滏赠roadcast from a live training event

* These programs are recommended for NACVA Recertification and qualify for NACVA Recertification Bonus Points.
This convenient method for gaining the highest quality of Continuing Professional Education* (CPE) is affordable, easy to access, and available to you on-demand.

You can also add Unlimited CPE On-Demand to any KeyValueData® subscription, including EconAssist™ which is available free to all NACVA members.

Unlimited CPE On-Demand subscribers can also add a subscription to Surgent CPE: NASBA qualified self-study courses to meet the needs of every CPA, tax practitioner, and financial professional.

Annual and monthly subscriptions available for Unlimited CPE On-Demand and Surgent CPE. Subscriptions require a one-year commitment. See page 44 for pricing details.

To learn more, visit www.CPE-On-Demand.com or call Member/Client Services at (800) 677-2009.

* Although webinars in the CPE On-Demand library qualify for NACVA CPE, they may not be accepted by all state boards or accrediting organizations. Therefore, individuals should contact their state board or accrediting organization as they have final authority on the acceptance of individual courses for CPE credit.
The National Association of Certified Valuators and Analysts® (NACVA®) has joined forces with Surgent CPE, a leader for over 30 years in continuing professional education (CPE) for CPAs and other financial professionals, to offer a bundle of 100 hours of NASBA-qualified self-study courses.

These courses are designed to enable CPAs, tax practitioners, and financial professionals to access the professional education they need, 24/7, in a variety of fields of study, including ethics, accounting, auditing, and taxes. All courses are sponsored by Surgent CPE, who awards the CPE certificates after successful completion.

The Surgent CPE self-study bundle can be purchased in a variety of ways through NACVA. The bundle is included as part of the Ultimate Training and Membership Subscription and the Ultimate Triple Play Subscription. Both of these subscriptions are designed to help members obtain required CPE for NACVA credential recertification and other credential requirements, including a CPA license.

The bundle can also be purchased as an add-on to any KeyValueData® (KVD™) subscription (silver and above). It can also be added to any Unlimited CPE On-Demand subscription, which is a KVD add-on option. These are available either as an annual or monthly add-on with a one-year commitment required. KeyValueData is the profession’s leading authority in valuation data, research, and support.

To learn more, visit www.NACVA.com/Surgent or call Member/Client Services at (800) 677-2009.
### Early Registration Deadlines

#### Live Classroom and Live Online Broadcast

Discounts will automatically be applied when registering. Some course dates do not qualify for early registration discounts.

<table>
<thead>
<tr>
<th>Month of Course</th>
<th>Location</th>
<th>10% Discount if registered by:</th>
<th>5% Discount if registered by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan./Feb. 2019</td>
<td>Salt Lake City, UT</td>
<td>11/30/2018</td>
<td>12/31/2018</td>
</tr>
<tr>
<td>May 2019</td>
<td>Chicago, IL</td>
<td>2/28/2019</td>
<td>3/31/2019</td>
</tr>
<tr>
<td>June 2019</td>
<td>Salt Lake City, UT</td>
<td>3/31/2019</td>
<td>4/30/2019</td>
</tr>
<tr>
<td>June 2019</td>
<td>Washington, DC</td>
<td>4/30/2019</td>
<td>5/31/2019</td>
</tr>
<tr>
<td>July 2019</td>
<td>Ft. Lauderdale, FL</td>
<td>5/31/2019</td>
<td>6/30/2019</td>
</tr>
<tr>
<td>July/August 2019</td>
<td>San Diego, CA</td>
<td>5/31/2019</td>
<td>6/30/2019</td>
</tr>
<tr>
<td>August 2019</td>
<td>Chicago, IL</td>
<td>6/30/2019</td>
<td>7/31/2019</td>
</tr>
<tr>
<td>September 2019</td>
<td>Atlanta, GA</td>
<td>6/30/2019</td>
<td>7/31/2019</td>
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<tr>
<td>September 2019</td>
<td>Philadelphia, PA</td>
<td>7/31/2019</td>
<td>8/31/2019</td>
</tr>
<tr>
<td>October 2019</td>
<td>Salt Lake City, UT</td>
<td>8/31/2019</td>
<td>9/30/2019</td>
</tr>
<tr>
<td>Oct./Nov. 2019</td>
<td>New Orleans, LA</td>
<td>8/31/2019</td>
<td>9/30/2019</td>
</tr>
<tr>
<td>November 2019</td>
<td>Houston, TX</td>
<td>9/30/2019</td>
<td>10/31/2019</td>
</tr>
<tr>
<td>November 2019</td>
<td>San Diego, CA</td>
<td>9/30/2019</td>
<td>10/31/2019</td>
</tr>
<tr>
<td>December 2019</td>
<td>Ft. Lauderdale, FL</td>
<td>10/31/2019</td>
<td>11/30/2019</td>
</tr>
<tr>
<td>Jan./Feb. 2020</td>
<td>Salt Lake City, UT</td>
<td>11/30/2019</td>
<td>12/31/2019</td>
</tr>
<tr>
<td>May 2020</td>
<td>Chicago, IL</td>
<td>2/29/2020</td>
<td>3/31/2020</td>
</tr>
</tbody>
</table>

#### Live Online Webinar

Purchase any live online webinar the month prior and receive a **10% discount** in addition to member discount. Discount date is calculated based on the start date of the webinar week. Discounts will automatically be applied when registering.

#### Social Media

- Social media is an essential part of doing business today and for building your online brand.
- Connect with and follow us to stay informed, and to share, co-create, discuss, and exchange information.

- LinkedIn.com/company/NACVA
- Twitter.com/NACVA
- YouTube.com/CTI2020
- Instagram.com/NACVA_CTI

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Let's Get Connected!

Let's Get Connected!

Call Member/Client Services at (800) 677-2009 or visit theCTI.com.
Consultants’ Training Institute® (CTI®) Administrative Information

NASB SPONSORSHIP:
The 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.nasbaregistry.org.

HOTEL ACCOMMODATIONS:
The CTI has negotiated and blocked accommodations at each CTI location (rooming blocks are limited). Hotel rooms are based on availability. Your registration confirmation will include details for lodging and other specifics, including event time schedule, modes of transportation, eating establishments, prerequisites (when applicable), etc. If your registration falls close to the date of the scheduled event, call CTI for hotel information.

SEMINAR CANCELATIONS:
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 when a refund is requested. A $150 administration fee will be charged for the NACVA and the CTI’s Annual Consultants’ Conference cancellations when a refund is requested. Credit requests for all live training event cancellations are not subject to an administration fee. Training may be rescheduled up to three times with no charge. Trainsings rescheduled more than three times will be subject to a $75 rescheduling fee. 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. 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.

COMPLAINTS AND REFUNDS:
No refunds will be given for airfares on a CTI event that is canceled for any reason. However, if an individual does not request a refund of training fees for the canceled event, electing to apply his or her fee to a subsequent offering of the event, we will issue a refund of 200 percent of the airline change fee for one airline only, to travel to and from the subsequent offering of the event, not to exceed $300 (proof of the expense for the airline change fee must be provided). Where airfare change fee refunds are given, no refund for the canceled event will subsequently be given for any reason, and the funds retained by CTI may only be used/applied towards a subsequent CTI training event. Membership dues are non-refundable, may not be transferred, and cannot be pro-rated. For information regarding administrative policies such as complaints and refunds, call Member/Client Services: (800) 677-2009.

INSTRUCTOR CHANGES:
The CTI reserves the right to change instructors at any time should circumstances dictate. Our policy is to screen potential instructors carefully, ensuring that each one chosen possesses substantial field experience as well as a teaching or presenting background. All instructors are evaluated by our participants, and future teaching assignments are made based upon these evaluations. From time to time, the CTI will introduce a new instructor to co-teach a course, but our policy is always to carefully pre-screen them and, where feasible, gradually integrate new instructors so you are assured of receiving the best instruction in the country in each discipline taught. Obviously, we cannot guarantee that every participant will be totally satisfied with every presenter, but every effort is made to ensure the competence of each instructor. Under no circumstances, however, can CTI refund course fees should a participant be dissatisfied with his or her instructor.

PROGRAM MATERIALS:
All courses are paperless. Attendees will be provided a link to course material that will be used during the course, so attendees will need a laptop with Internet access. The CTI will provide electric power and Internet access, but will not provide laptops. Attendees are encouraged to bring their own mobile wireless modem or hotspot device.

For NASBA-related information on CPE, course timing, faculty, etc., please refer to www.theCTI.com.
The Profession's Leading Authority in Valuation Data, Research, and Support

Through its five web-based annual subscription packages, KeyValueData® offers Internet-based access to thousands of dollars in essential valuation data, research, and tools—all for a single, low annual subscription fee.*

### Purchase a Database à la Carte or Bundle and Save

<table>
<thead>
<tr>
<th>Database Source</th>
<th>À LA CARTE PRICE</th>
<th>ECON ASSIST</th>
<th>SILVER</th>
<th>GOLD</th>
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### TOTAL BUNDLE VALUE‡

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### Actual Bundle Costs

**ECON ASSIST**

**SILVER**

**GOLD**

**PLATINUM**

**TITANIUM**

### Bundle Add-Ons (Additional Fee Required)

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<td>Unlimited CPE On-Demand Webinars</td>
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<td>Surge CPE: NASBA Qualified Self-Study Courses</td>
<td>$240 / $20</td>
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</table>

* See website for details, conditions, and upgrading to unlimited BIZCOMPS. EconAssist is free with NACVA membership.

† To receive CPE for attending this course, which awards bonus points for NACVA’s recertification, there is an additional annual cost of $225.

‡ Bundle value is a composition based on established retail prices if purchased separately, what competitors charge for the data/service if we do not sell it separately, and estimates of what we would charge on data not found elsewhere if we did sell the data separately.

§ Requires annual commitment.

‡ Requires annual commitment.

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