



ANNUAL CONSULTANTS' CONFERENCE

JUNE 8-11
2011
SAN DIEGO

NATIONAL ASSOCIATION OF CERTIFIED VALUATORS AND ANALYSTS • INSTITUTE OF BUSINESS APPRAISERS

Track: **Pre-Conference Symposium: Current Update in Valuations**

Session Date/Time: *Wednesday, June 8, 2011 • 10:15 – 11:55 AM*

Session Title: **Industry Standards: Ready to Protect and Serve**

Session Summary: This session will cover updates to professional and industry standards. This session will discuss changes in the IRS position when challenging valuation reports and valuations. Insight as to pitfalls and traps when preparing valuation reports for gift and estate and charitable purposes. Where is the profession heading for valuations in marital dissolutions, is there a correct standard and where is this maze taking us. What can I do under a tight budget and taking a second look at a Calculation of Value assignment? Wrapping up this session evaluate how have recent developments within professional organizations, judicial precedent, regulations have affected valuations from an efficiency, competency and economic production perspective.



CPE Hours/Fields of Study: CPE: 2 • 1Hr-BE, 1Hr-RE

Presenter Bio(s): **Nancy Fannon, CPA/ABV, MCBA, BVAL, CBA, ASA**



Nancy has more than 20 years of professional valuation and damages experience, and is frequently retained to provide expert witness services relating to the value of a business; an opinion on the amount of financial damages relating to the lost profits or the loss of a business or segment of a business; a determination of reasonable compensation; and other financial matters.

Mark Hanson, CPA/ABV, CVA

Mark is a Shareholder of Schenck & Associates SC, located in Appleton, Wisconsin. He has over 30 years of experience in including acting as trustee in bankruptcy in the investment, real estate, insurance, and construction industries.

Mark Kucik, CPA, CVA, CM&AA

Mark is founder of The Kucik Valuation Group, LLC, of Chicago, Illinois, specializing in business valuations of family-owned and closely held securities for use in estate tax planning, financial statement reporting, estate tax returns, gift tax returns, buy/sell agreements, purchase/sale transactions, ESOPs, economic damages, matrimonial and shareholder disputes.

