



# ANNUAL CONSULTANTS' CONFERENCE

JUNE 8-11  
**2011**  
SAN DIEGO

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

Track: **Practice Management**

Session Date/Time: *Friday, June 10, 2011 • 2:05 – 3:45 PM*

Session Title: **Selling the "True Corporate Model" Concept**

Session Summary:



This presentation introduces a new value-added service that CPA/CVAs can sell to existing private business clients. This service leads to creation of an active, internal, demand market for private company ownership units. Clients who subscribe realize increased earnings and values per share in the short term and develop a new buyer for their ownership interest on their retirement in the long term. Fees range from \$10,000 to \$30,000 per engagement. Attendees will learn how to sell this new value-added service to their clients. A textbook available at the conference will provide more specifics about each step in the process, client examples, sample legal language for buy/sell agreements, and do's and don'ts learned by the author over his 15 years of selling and implementing the service.

CPE Hours/Fields of Study: CPE: 2 • 1Hr-BM&O, 1Hr-MAS

Presenter Bio(s): **David M. Cooper, CPA, CVA**



Dave is a senior financial advisor to private businesses in the Western US. He assists businesses to structure and restructure debt and equity offerings and to move from a control model to a more dynamic True Corporate Model for management and transition purposes. Dave was the Managing Member of a full-service CPA firm for 20 years. Under Dave's direction, the firm grew significantly following the True Corporate Model. Dave retired from the CPA firm in May 2009, so that he could devote more time to teaching his True Corporate Model concept to private business owners and to CPA's.