

Katherine Morris, ASA
Election Biography

Member since 2001

Accredited Senior Appraiser designation 2008

Atlanta Chapter - President (2017-2018), Membership Chair (2013-2016), Treasurer (2010-2011), Secretary (2009-2010)

I provide valuation services through my firm, Aequus Valuation Advisors, specializing in valuations for estate and gift tax and for corporate and tax litigation and strategic planning advisory services.

Co-author, Financial Valuation: Applications and Models, 4th edition and upcoming 5th edition Co-author, Discounts for Lack of Marketability Guide and Toolkit

BS – Georgia Institute of Technology

MBA – Georgia State University

Why do you feel you are qualified for this position? Include information on past volunteer positions with ASA and other organizations.

Over the course of my nearly 30 years of professional valuation practice, I have performed valuations for a variety of purposes including estate and gift tax, financial reporting, transaction advisory and corporate, divorce and tax litigation. For many of these projects, I collaborated closely with ASA colleagues in machinery & technical specialties and real property. I also understand the challenges of operating a valuation practice.

Throughout my career, I have been actively involved in the ASA through past leadership roles in the Atlanta Chapter and in valuation thought leadership as a co-author of Financial Valuation: Applications and Models and Discounts for Lack of Marketability Guide and Toolkit and various articles and presentations.

For the past couple of years, I have managed an affiliation network of independent valuation practices and an organization providing educational products and presentations specifically tailored to valuation professionals. Based on my experience and feedback from colleagues, I worked closely with industry thought leaders to develop educational programming to meet the needs of valuation professionals. Through this experience, I have a better understanding of the training topics, valuation conundrums and business practice development issues for which professionals seek guidance and advice.

What contributions have you provided ASA as a member or to a comparable organization(s)?

I have been actively involved in the leadership of the Atlanta Chapter of the ASA as Secretary, Treasurer, Membership Chair and President. I have mentored colleagues pursuing an ASA credential, provided guidance on development of reports and served as a proctor for exams on behalf of members.

What do you wish for ASA's members?

I would like to see improved awareness of the significance of the ASA credential as the pre-eminent valuation credential. I am excited about contributing to best-in-class professional education and training

to improve methodology and practice. I would like to engender a community of mutual support and collaboration.

What do you wish for ASA in the profession?

Among appraisal credentialing organizations, the ASA is unique in that it is an umbrella organization for multiple valuation disciplines which presents a significant opportunity for growth, collaboration and support. Through my active involvement in the ASA, I have been able to develop lifelong professional relationships across disciplines that have been mutually beneficial and supportive.

My goal in a leadership role for the ASA would be to communicate the benefits of being a member in a respected professional organization to the next generation of valuation professionals and to encourage and promote their active participation. I would promote outreach to universities to expand awareness of the appraisal profession to students and individuals beginning their career in accounting and finance. I would also support the ongoing expansion of ASA global learning opportunities and credentialing.

Why should members vote for you?

My experience of almost 30 years as a valuation professional combined with experience managing an affiliation organization and educational programming will provide a well-rounded perspective to the challenges of ASA as a credentialing organization.