

## **Curtis Kimball**

### **Election Biography**

Current Position: Managing Director, Willamette Management Associates

Reside and work in: Atlanta, Georgia

Client base: Nationwide and (for US tax matters) international

I have presented expert witness testimony over 70 times in federal courts (U.S. Tax Court, U.S. District Court, U.S. Court of Federal Claims, and U.S. Bankruptcy Court) and in various state courts and in alternate dispute resolution venues, including mediation and binding arbitration. I act as our firm's national director for wealth management valuation matters (including estate, gift, charitable, fiduciary, and marital planning, expatriation, buy-sell agreements, and related dispute resolutions and tax issues for high net worth families and their business interests) and have extensive experience with appearances in IRS appellate conferences. I also work on other cases of interest brought to Willamette because of our experience and expertise.

I am also an accredited investor who has purchased and sold private company investments for my own account.

Education: BA-Economics, Duke University; MBA, Emory University

### **Why do you feel you are qualified for this position?**

I hold the professional designation Accredited Senior Appraiser (ASA) in business valuation (1983) and in appraisal review and management in business valuation (2020) from the American Society of Appraisers. I have served as a member and the Treasurer of ASA's Business Valuation Committee, as a member of the ASA's International Ethics Committee, its Investment Policy Committee, and its International Board of Examiners. I am currently a member of the ASA's Business Valuation Standards Sub-Committee. I have served as president, secretary, and treasurer of the Atlanta Chapter of the ASA. I also served as the past chair of the Atlanta Chapter's Business Valuation Committee. I have served as Treasurer of the Portland Chapter of the ASA.

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

See above for ASA. I have also worked on a number taskforces for the ASA for business valuation standards and planning issues.

I also hold the Chartered Financial Analyst (CFA) professional designation from the CFA Institute (CFA-I). I was a member of CFA-I's Board of Examiners and was a senior grader for the examinations leading to the CFA designation. I served as a member of the Disciplinary Review Committee of CFA-I and served as a member of the disciplinary/ethics hearing panelist pool. I was a member of the Portland Society of Financial Analysts (CFA-I's Oregon chapter), for which I served as secretary and a member of the board of directors. I served on the board of trustees of the CFA Society Atlanta (CFA-I's Georgia chapter) and has also served as its Membership Chair.

I am also a member of the Institute of Management Accountants, the National Association of Corporate Directors, TiE Atlanta (a technology angel investor group), and the National Association of Business Economists, for which I held positions as president of the Portland chapter and treasurer of the Atlanta chapter.

I am currently Treasurer of the Indian Hills Civic Association, a voluntary homeowners association of over 1,000 households that are part of the Indian Hills community in the northwest suburbs of Atlanta.

I currently raise funds for, and previously served as board member and Chair of, the Community Assistance Center, a charitable nonprofit providing basic needs assistance for neighbors in the northern suburbs of Atlanta to prevent homelessness and hunger while promoting self-sufficiency and empowering people to thrive.

### **What do you wish for ASA's members?**

The three key areas of our professional association are:

- Provide a clear and direct path for new membership and growth in professional specialized knowledge leading to bona fide, credible credentials.
- Provide membership service with efficient, effective, and transparent support and governance activities.
- Provide a strategic vision with near-term and long-term plans and goals

I pledge to work toward maintaining and improving the ASA in these key areas. I pledge to do this with your help and input.

### **What do you wish for ASA in the profession?**

In addition to the three areas noted above, the ASA needs to:

Provide thought leadership to the business valuation profession and contribute to the community of professionals (including other valuation professional associations worldwide that want to improve the level of valuation services) who want to make meaningful progress in advancing the level of knowledge and professionalism in valuation services.

### **Why should members vote for you?**

Now that I am a senior member of our firm, I have more time to give back to our profession and to help to continue to make the ASA grow in both size and stature.

I don't claim I know all the answers now, but if you elect me I will strive to listen to and work with all of you to make sure we are making progress on all fronts during my term in office.