Sunday, September 11, 2022

CONTENT SUBJECT TO CHANGE
All session times noted are U.S. Eastern Time

8:00 - 8:30am  Welcome & Opening Remarks
Johnnie White, MBA, CAE, CMP  |  CEO/Executive Vice President  |  American Society of Appraisers
Richard Berkemeier, ASA  |  Pegasus Aircraft Appraisal Group

The presentation is designed to provide an overview of the various categories of digital assets, as defined by their specific use cases. Building on these fundamentals, the presentation will explore the process by which these digital assets accrue value through the use cases they instantiate, as well as the perceived mindshare they capture among market participants. Finally, the presentation will provide an overview of some of the basic methodologies utilized in the “tokenomic” design of digital assets, with a focus on the capture of value.

8:00 - 9:30am  Keynote Address: The Status and Outlook for the U.S. Economy
LaVaughn M. Henry, PhD, CBE
Special Assistant to the Sr. Deputy Director of Supervision and Policy in the Division of Risk Management & Supervision  |  The Federal Deposit Insurance Corporation (FDIC)

9:35 – 10:35am  [ARM/Multi-Discipline]  
An Introduction to Digital Assets: Use Cases and Value Accrual
Tara Singh, CPA, CBV, CFE  |  Managing Director  |  FTI Consulting
Anastis Anastasiou, MBA  |  Director  |  FTI Consulting

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11:00am – 12:00pm  [ARM/Multi-Discipline]  
Session TBA
Applying USPAP in an Appraisal Review Assignment
Barry J. Shea, ASA, IFA, ARM | Real Property Appraiser | Barry Shea and Associates

This program will address how and when USPAP applies in appraisal review assignments. It will include a brief review of the key applicable USPAP definitions and go on from there to address scope of work, report formats, and competency in various scenarios applicable to various disciplines, property types, and assignment types.

Bad Trial Testimony-Avoiding the Chasm Below the Bridge of Death
Edward Kainen | Senior and Managing Partner | Kainen Law Group

This will be a presentation, using actual trial testimony, which will illustrate major pitfalls by testifying witnesses that can single-handedly result in losing a case and sacrificing the testifying expert's credibility. The course will focus on keys for report preparation, necessary preparation for trial, recognizing traps while testifying, "reading the room" at trial, and maintaining credibility with the Court.

CRAC Can Save Your Life!....Professional Life, That Is!
Melanie Modica, ASA, ARM, CFLC | Modica Fine Art LLC

Find out how the simple, clear, concise structure of CRAC methodology can safeguard your career against deadly defamation, brutal bias, and perilous partiality. Join appraisal review colleagues and meet new colleagues-to-be in this important appraisal review report writing session. Don't go your own way and find yourself free fallin' under pressure...Come save your written words from going off the rails on a crazy train.

How Lawyers Determine if an Appraisal is Credible
Charles E. Blau, Esq., ASA, CRE | Partner | Blau & Blau

An attorney reviews an appraisal report differently than a review appraiser looking for USPAP compliance. We are concerned only with credibility, which depends primarily on the appraiser’s facts and reasoning.

Marina Appraisals
Matthew Kaufman, ASA ARM-MTS | President | Spearhead Valuation Group
Melanie Modica, ASA, ARM, CFLC | Modica Fine Art LLC
Mike Pratt, ASA | Director of Education Services | Palm Beach County Property Appraiser
Gary R. Trugman, CPA/ABV, FASA, MVS | President | Trugman Valuation Associates, Inc.
10:30am - 12:00pm

Marina Appraisals (cont.)

Matthew Kaufman, ASA ARM-MTS | President | Spearhead Valuation Group
Melanie Modica, ASA, ARM, CFLC | Modica Fine Art LLC
Mike Pratt, ASA | Director of Education Services | Palm Beach County Property Appraiser
Gary R. Trugman, CPA/ABV, FASA, MVS | President | Trugman Valuation Associates, Inc.

1:00 - 2:00pm

Writing An Effective Rebuttal Report

Gary R. Trugman, CPA/ABV, FASA, MVS | President | Trugman Valuation Associates, Inc.

This presentation will provide the participants with a refresher on USPAP Standards 3 and 4 as well as how to prepare a strong rebuttal report that will be used in a litigation setting. The discussion is expected to include how to turn your affirmative report into a strong critique of the opposing side's report.

2:30 – 3:30pm

Getting Engaged: Setting the Boundaries for a Healthy Client Relationship

Kieran Wheeler | Shareholder | Rapp & Krock, PC

This presentation will explore the legal and business considerations of common provisions in a client engagement letter, with a focus on enhancing the payment of fees, and limiting exposure to claims. It will include a discussion of frequently negotiated provisions such as arbitration clauses, indemnification, and liability caps, as well as some of the key components of the engagement process, from the “battle of the forms” to ensuring that the agreement is enforceable.

3:35 – 4:35pm

What I Have Learned in Tax Court and IRS Audits

Bruce Johnson, ASA | Managing Partner | Munroe, Park & Johnson, Inc.

Over the past 28 years, Bruce A. Johnson, ASA has been involved in several landmark Tax Court cases and IRS Audits. Based on these experiences, this session will share how the IRS audit to Tax Court process works along with firsthand accounts detailing what Mr. Johnson learned along the way. The information will be presented in a case study format. The IRS challenges involved transfers of minority interests in family limited partnerships and operating companies. Mr. Johnson will share how the IRS responded, some tips to avoid IRS scrutiny and how to build a stronger appraisal report.