

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 Fellow | CEO/Executive Vice President

Richard Berkemeier, ASA | Pegasus Aircraft Appraisal Group

8:00 - 9:30am

Keynote Address: The Status and Outlook for the U.S. Economy

[LaVaughn M. Henry](#), PhD, CBE

former Senior Economist for the Council of Economic Advisers in the Executive Office of the President (the White House), and the Senior Regional Officer and Vice President for the Federal Reserve Branch in Cincinnati

In this enlightening keynote, learn the strategies and tactics of self-discipline in the context of an aligned personal achievement process, making the execution of necessary tasks much easier. Self-discipline is a life skill that can be readily learned when it is intelligently approached. It is more complicated—and easier—than merely forcing yourself to work harder. The exercise of self-discipline can be made easier by understanding the larger context of a personal achievement process. Considered in this framework, the daily exercise of self-discipline results in successfully achieving goals and experiencing the freedom and happiness created by your accomplishments. When you are comfortably moving toward your life vision, you experience a deep emotional satisfaction that is simply incomparable.

9:35 – 10:35am

[Gems & Jewelry]

Geopolitics and the Jewelry Industry

[Avi Krawitz](#), BCOM, AJP, Diamonds and Diamond Grading | Senior Analyst | Rapaport Group

[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

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.

11:00am – 12:00pm

[Gems & Jewelry]

Authentic Luxury & Counterfeit Culture

[Graham Wetzberger](#) | Founder & CEO | Luxury Appraisals & Authentication

Hermes handbags, Rolex watches, and archival fashion are stars of the personal luxury market, which is expanding at a rapid pace. With the emergence of new asset categories, counterfeiters are rampantly polluting the marketplace with illegal replicas. This session will provide an overview of the complex process of authenticating luxury goods as well as a discussion of the prevalence, nuance and quality of counterfeits. As values increase and appraisers are increasingly asked to wade into this area, it is critical to know what to look for and when a specialist may be needed.

[ARM/Multi-Discipline]

Appraisals in the Courtroom - From A Judge's Perspective

[Robert Kelley, Jr.](#) | Shareholder | Hill Ward Henderson

The Honorable Darren D. Farfante | Hillsborough County (Florida) Circuit Court

1:00 – 2:00pm

[Gems & Jewelry]

Changes in the Luxury Watch Market

Ken Specht | The Specht Sheet

The changes in The Luxury Watch Market in the past year has been dramatic. This has more ups and downs than in the past several years.

[ARM/Multi-Discipline]

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.

2:05 – 3:35pm

[Gems & Jewelry]

Appraising for Resale: Recognizing Markets and Values

[Duncan Parker](#), FGA, FCGMA, CAP (CJA) | Vice President | Dupuis Fine Jewellery Auctioneers

Appraisers are often asked to document jewels that might be destined for resale. Clients rely on the expertise of appraisers to provide expert guidance on the disposition of jewels. This expertise may include well considered directions for the best and most appropriate market, but, importantly, the appraisal value for the correct market for each item. The style, brand, condition, and thus, desirability of a jewel may also affect its resale value. This presentation will explore the various markets and levels of value appropriate for the resale of jewels.

[ARM/Multi-Discipline]

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.

4:00 - 5:00pm

[Gems & Jewelry]

9000 Years of Precious Metals Used in Jewelry

[Charles Carmona](#), ASA | President | GUILD LABORATORIES INC

From the earliest history of the use of precious metals in jewelry through modern times and into the future, this presentation will cover topics of basic metallurgy, historical and current environmental impact, refining processes and potential sources of precious metals going forward. Sources of published historical and scientific papers will be cited for further investigation by attendees.

[ARM/Multi-Discipline]

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 tutorial. 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.

Monday, September 12, 2022

8:00 – 9:00am

[Gems & Jewelry]

Protecting Passion Investments

[Michelle Impey](#) | AVP, Fine Art & Collections Manager | Chubb

What are the top causes of loss for collections? Are there new risks that are emerging? What's insurable and what's not? What are the appraisal requirements? Help your clients avoid common pitfalls by learning about loss trends, insurance coverage benefits, and risk mitigation for collections.

[ARM/Multi-Discipline]

[Michael Gregory](#), ASA | Founder/Owner | Michael Gregory Consulting, LLC

This session will focus on business valuation experts in various forms of alternative dispute resolution with an emphasis on mediation. Experts can be highly effective and powerful in helping to resolve issues if you are properly prepared, and your mediator in mediation has knowledge, expertise, and experience in this area and mediation. This session will provide you with what you need to consider with the application of alternative dispute resolution in general and in mediation in particular.

9:05 - 10:05am

[Gems & Jewelry]

Lab Grown Diamond Market: ID, Grading and Wholesale/Retail Markets

[Don Palmieri](#), ASA, GG, MGA | President | Gem Certification & Assurance Lab (GCAL)

Learn more about this important topic that is going to become more and more important to appraisers as the Lab Grown Diamond sector has gained overwhelming acceptance from the public, especially in Bridal purchases.

Major brands like Tag Heuer, Richemont and LVMH have hinted at LGD initiatives. The growth of LGD has basically grown organically without any significant marketing. With Russian diamonds all but banned from the free world, the biggest boost will be to LGD.

[ARM/Multi-Discipline]

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

[Mike Hill](#), FASA | Partner | Weaver & Tidwell LLP

[Pamela Bensoussan](#), ASA, ARM | Owner | Bensoussan & Associates

Join the appraisal manager as a team is assembled for a multidiscipline assignment, and coordinated to the point of report completion. Large appraisal assignments require the hiring of appraisal professionals in multiple disciplines, multiple specialties, and the oversight of the entire appraisal process—from interviews, to scope of work, and much more. Witness a mock experience of the appraisal management process and consider becoming an appraisal team manager.

10:30am - 12:00pm

[Gems & Jewelry]

Appraising the Jewelry After It's Gone

[Teri Brossmer](#), ASA, ARM-GJ, Master Gemologist Appraiser | Gemologist-Appraiser/President | Gem Appraisals Unlimited, LLC

This presentation will address some of the unique issues commonly encountered in post loss appraisal assignments. The lecture will be followed by interactive case studies designed to provide attendees with the opportunity to work together to discover ways to produce credible assignment results by overcoming the challenges of appraising jewelry when it cannot be inspected.

[ARM/Multi-Discipline]

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

[Mike Hill](#), FASA | Partner | Weaver & Tidwell LLP

[Pamela Bensoussan](#), ASA, ARM | Owner | Bensoussan & Associates

Continuation of previous session.

1:00 - 2:00pm

[Gems & Jewelry]

Appraising Nature's Artwork: Minerals and Gems

[Dr. Cigdem Lule](#), PhD, FGA, GIA GG | Owner | Kybele LLC

Mineral collecting is an age-old practice and requires understanding of geology as a science. Until the end of 20th century it was exclusively done for research and curiosity. Globalization and broadened interest for unusual items have led to an increase in the number of serious mineral collectors. Natural mineral and gem materials are highly collectable, yet their value determinants can be complicated to understand. Considering these materials are also too frequently encountered in the context of investment fraud, an independent specialist should be consulted for them, especially for large and rare examples. The speaker will probe the subject from the appraisal perspective.

[ARM/Multi-Discipline]

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

[Gems & Jewelry]

Tough Talks, Difficult Discussions and Crucial Conversations

[Phillip Bosen](#) | CEO/ Chief Strategist | Bosen Associates

Tough talks are when opinions differ, stakes are high and emotions are strong. When handled skillfully they create breakthroughs and when handled poorly they create breakdowns. Unfortunately, when it matters most, we do our worst. With guidance and practice we can improve and become the leaders that are needed.

[ARM/Multi-Discipline]

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

[Gems & Jewelry]

Understanding Hardstone and Gem Carvings

[Dr. Cigdem Lule](#), PhD, FGA, GIA GG | Owner | Kybele LLC

Practice of carving goes back to Paleolithic age. The sophistication of some of the archaeological pieces suggests a form of deep symbolism, yet we will never know the true meanings. Today's carvings, however, range from mass production to rare artwork,

not only performed on the ordinary rocks, but also on rare minerals. In this talk, Dr. Lule will share her perspective on carvings and their value factors.

[ARM/Multi-Discipline]

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.

