

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 | ASA  
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

**[Real Property]**

**Big Data Valuation Tools and Current Market Trends**

[Mitch Helman](#) | Sales Manager of Auction Platforms | Sandhills Global  
[Matt Sterup](#) | Sales Manager of Construction and VIP | Sandhills Global

Through Machinery Trader, Truck Paper, TractorHouse, AuctionTime, and other platforms, Sandhills Global is a leading resource for appraisers, buyers, and sellers of construction equipment, farm machinery, trucks, and trailers worldwide. Our services include Value Insight Portal (VIP), which provides streamlined access to the industry's most precise equipment valuation tool. Powered by FleetEvaluator, VIP calculates asset values for retail and auction markets and includes access to additional sales tools, enabling appraisers and sellers to make key decisions. Our presentation will illustrate how Sandhills delivers Big Data tools to streamline the appraisal and valuation process.

**[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**

**[Real Property]**

**Caffeinated Appraisals: What Keeps You Up at Night**

[Jeff Rauland](#) | Chief Appraiser | Consolidated Analytics

[David Fry](#) | VP Risk Appraisal Manager | AmeriHome Mortgage Company LLC

Join Jeff Rauland and Chris McLain in a caffeinated discussion on the current state of the appraisal business, what challenges keep you up at night, and potential innovations that may help take us from jittery to calm. Grab a delicious cup of coffee or tea and pull up a chair for some frank dialogue and healthy debate. Format: Interactive and engaging. Circle style discussions live on stage with easy chairs, a batch of coffee, and audience engagement tools.

**[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**

**[Real Property]**

**Reducing Revisions Requests**

[Jeff Rauland](#) | Chief Appraiser | Consolidated Analytics

Lenders, AMCs, and especially appraisers all want the same thing – fewer revisions. So why are we seeing more than ever? Join this interactive session to learn why we are seeing so many revisions, and what you can do to reduce revisions, prevent headaches, and make more money by being more efficient.

**[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**

**[Real Property]**

**Renewable Energy Valuation and Cost Segregation**

[Steven Munson](#), ASA | Director | CohnReznick

An overview of the three approaches to value and the application in the valuation of renewable energy and power assets.

**[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

**[Real Property]**

**What's Your Slant? Bias n Appraising**

[Byron Miller](#), SRA, AI-RRS, RAA, MSSE | BM Appraisals

**[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

**[Real Property]**

**Basic Overview of Accessory Dwelling Units**

[Jason A. Tillema](#), SRA, AI-RRS, ASA, IFA | Appraiser | Access Valuation

The presentation will provide students with an overview of the issues related to Accessory Unit Dwellings. Once properly identified, various methods for valuing and developing adjustments will be discussed.

**[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

**[Real Property]**

**Valuing Accessory Unit Dwellings (cont.)**

[Jason A. Tillema](#), SRA, AI-RRS, ASA, IFA | Appraiser | Access Valuation

The presentation will provide students with an overview of the issues related to Accessory Unit Dwellings. Once properly identified, various methods for valuing and developing adjustments will be discussed.

**[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

**[Real Property]**

**Damages and Valuation Experts**

[Karl Schwabauer](#), CPA, CFF, CVA | Business Advisory Services Team - Dallas, TX | Rosenfield & Co.

[Sean Saari](#), CPA, ABV, CVA, MBA | Partner | Marcum

Preparing a valuation or damages analysis can be difficult enough, let alone defending it against an opposing party questioning your every move. It is important for valuation and financial experts to know how their work may be challenged by other experts and work to effectively address these issues pre-emptively. Presenters Karl Schwabauer and Sean Saari will discuss how to prepare yourself, and your report, when you know your work will be subject to review and critique in a litigation or dispute setting.

**[ARM/Multi-Discipline]**

**Marina Appraisals**

[Matthew Kaufman](#), ASA ARM-MTS | President | Spearhead Valuation Group

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

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

*Continuation of previous session.*

1:00 - 2:00pm

**[Real Property]**

**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

**[Real Property]**

**Lions, Tigers and Zebroids: The Emergence of Hybrid Appraisals**

[Jeff Rauland](#) | Chief Appraiser | Consolidated Analytics

As regulators begin to embrace hybrid appraisals, Jeffrey Rauland and Lisa Stratton from Consolidated Analytics ask the question, what does the future of hybrid appraisals look like? These two experienced valuation professionals examine current hybrids and desktops, and consider other “modern” and non-traditional appraisals. What defines a hybrid appraisal and what are some of the more interesting combinations of components that could change the game for appraisers, AMCs, and valuation providers.

**[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

**[Real Property]**

**Data Visualization for Residential Appraisers**

[Jason A. Tillema](#), SRA, AI-RRS, ASA, IFA | Appraiser | Access Valuation

This presentation will provide attendees with an introduction to benefits of utilizing Data Visualization. Examples of how Excel and other readily available programs can increase the credibility and quality of an appraisal will be provided. No knowledge of Excel is necessary for this introductory session.

**[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.

