



Monday, October 2, 2023

CONTENT SUBJECT TO CHANGE

All session times noted are U.S. Central Daylight Time

8:30 - 8:45am

Welcome & Opening Remarks

[Johnnie White](#), MBA, CAE, CMP | CEO/Executive Vice President | ASA

[Garrett Schwartz](#), ASA, CEA | Senior Equipment /Appraiser | Sencer Appraisal Associates

8:45 - 9:45am

Keynote Address: Attempting Everest the Harder Way

[Nick Talbot](#) | Chief Executive Officer | IVSC

Come and listen to Nick Talbot's humorous but motivating take on living a life less usual. Nick was born with Cystic Fibrosis which can destroy the lungs and other organs to the extent that he had a life expectancy of 16. Nick is now the CEO of the International Valuation Standards Council and has managed to get through a few near-death experiences including being on Everest for the two worst natural disasters in history. Hear about his approach to challenges in both the world of appraisal and mountaineering to push boundaries and fundraise for charities around the world.

10:15 – 10:25am

[Gems & Jewelry]

Discipline Welcome

10:25 – 11:25am

[Gems & Jewelry]

Repair and Alteration to Jewels and Their Effect on Value

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

Repair or alteration to jewels is common. Sizing a ring or converting a ring into a pendant are natural ways to ensure that jewels continue to be enjoyed. Some alterations are considered standard and may have very little effect on value. Other modifications, gem substitutions, or repairs may have a substantial impact on the value of a jewel. In this presentation, we will explore the identification of repair or alteration to jewels, and how these changes may affect the value of a jewel.

[Personal Property]

The Beginning and Evolution of Valuation Around the World

[Ivo Kostov](#), Ph.D. | Chief ASST Professor/Certified Valuer | Department of Business, Investment, Real Estate, Faculty of Economics, University of Economics - Varna, Bulgaria

The presentation examines the development of valuation worldwide during the last 130 years. First, the foundation of the valuation theory and practice is explored, namely the

concept of "value," defined as early as the 18th-19th century. Then, based on in-depth scientific research by the author, including a project financed by the state budget of a member state of the European Union, the material presents data on the very beginning of modern valuation activity. Finally, the information for the subsequent development of valuation in the 20th and 21st centuries includes global data for established valuation professional organizations, various standards, and novelties.

[ARM/Multi-Discipline]

Mistakes to Avoid in Litigation Appraisals

[Charles E. Blau](#), Esq., ASA, CRE | Partner | Blau & Blau

What do lawyers look for to show the appraisal is not credible? Learn more about the importance of confirmations, inspections of comps and omissions.

11:30am – 12:30pm

[Gems & Jewelry]

The History of Design: Symbolism in Jewelry

[Sindi Schloss](#), GG | President | International Gemological Services

Symbolic thought defines us as "modern man". Jewelry is one of the first indicators of symbolic thought and predates rock art by 90,000+ years. This presentation will examine primary symbols represented in ancient, antique, contemporary and global jewelry as well as cultural symbols. The information gleaned from this presentation will give appraisers not only a greater ability to interpret the purpose and meaning of jewelry, but will assist in determining geographic origin of a piece of jewelry or article of adornment.

[Personal Property]

Beyond the Obvious: A Panel Discussion

[Susan M. Golashovsky](#), FASA | Owner | Susan M. Golashovsky LLC

[Liza Hickey](#), ASA | President | Applied Art Appraisals

[Darcy Tell](#), AM, ASA | Antiques & Decorative Arts Specialty

[Frances Zeman](#), M.A., FASA | President | Appraisal Resource Associates

Three objects that, at first glance, look relatively common. Until a deeper look reveals a unique characteristic that increases rarity and adds value. This panel provides insight from three appraisers who were required to employ divergent thinking in order to either recognize a critical characteristic, and/or develop a justifiable argument for a value conclusion when there may be no true comparable object.

[ARM/Multi-Discipline]

Succession Planning for Appraisers

[Tyler J. Arbour](#) | Shareholder | Lugenbuhl, Wheaton, Peck, Rankin & Hubbard

William Tomlinson, CRPC | Wealth Advisor | Independence Wealth Advisors

[Jack Beckwith](#), ASA | President | EAGI

[Charles C. Dixon](#), ASA (MTS-ARM), CSA | President/Owner | CD Valuation Services

This will be a highly interactive session sharing ideas about succession planning options for the small practices and sole practitioners. Seasoned practitioners will walk away with options and a list of things to not overlook. Younger professionals may just find a new opportunity. If you have already had success in this area, please also join us and share your experiences.

1:30 – 2:30pm

[Gems & Jewelry]

Jewelry as Art

[Carole C. Richbourg](#), ASA, GG, FGA | Owner | Fine Jewelry Appraisals and Consulting Inc.

The intersection of fine art and jewelry has been of interest to artists and jewelry designers alike. As a genre, “Art Jewelry” is attracting serious attention from the major auction houses. Fine art and jewelry appraisers are therefore encountering challenges in appraising art jewelry as the two disciplines converge and collaborate. This presentation, which was born out of an earlier panel presentation by the ASA Northern California Chapter, delves into issues like how we define “Art Jewelry”, whether a piece would be considered fine art or fine jewelry, ranking and value characteristics, uniqueness of design vs. materials, methodology and valuation sources. It will also include information from an experienced curator and jewelry retailers who deal exclusively with this type of jewelry. Included are examples of well-known and not so well-known artists who made jewelry, and jewelers who made art.

[Personal Property]

Katherine Choy: 1950s Radical Potter at Newcomb in New Orleans

[Peter Held](#), ASA | Principal Owner | Peter Held Art Appraisals & Associates, LLC

[Mel Buchanan](#) | Curator of Decorative Arts & Design | New Orleans Museum of Art

Katherine Choy (American, b. China 1927-1958) was one of the first ceramicists to bridge Asian traditions into Modern abstract art. A 2022 exhibition and catalog at the New Orleans Museum of Art was the first monographic review of this artist who was celebrated by the 1950s American craft world but has nonetheless been nearly forgotten. This presentation puts Choy's work in context of both ceramics at New Orleans's Newcomb College, where she taught in the mid-1950s, and examines the artist's leadership in evolving clay from purely utilitarian objects and into the purview of expressive fine art.

[ARM/Multi-Discipline]

Understanding The Ad Valorem Market

[Mike Pratt](#), ASA, IFA, IAAO-P, CFE, CAM | Director, Education Services Division | Palm Beach County Property Appraiser

[Richard Conti](#), ASA, ARM, MAA | President | Conti Appraisal Service

This session will acquaint the MTS, PP, RE and Business Valuers with the Ad Valorem Market presented by two sitting Tax Assessors. Representing large and small jurisdictions, the assessors will detail how appraisers get business from municipalities and county jurisdictions what is expected of them. Actual case histories will be examined including appraisals focused on the income and market approaches. Appraisal Review case histories will be included in the presentation. As a result of attending, appraisers will have an orientation to develop their participation in this large market understanding the assessment process, protocols and opportunities.

2:35 – 3:35pm

[Gems & Jewelry]

Modernizing Gemology - Applications of Basic Spectroscopy Techniques in Everyday's Gem Laboratory Practice

[Alberto Scarani](#), GG, IGA, AGA | CEO | Magilabs USA

The presentation will provide an overview of how gem laboratories today tackle and resolve the most intricate gemological challenges, utilizing advanced spectroscopic technologies.

[Personal Property]

The Market for Louisiana Art: Two Decades in Review

[Amanda Winstead](#) | Appraiser & Fine Art Dealer | Amanda Winstead Fine Art LLC

The market for Louisiana paintings has grown tremendously in the last twenty-five years, thanks to expanding interest from a broader group of collectors and the establishment of museums dedicated specifically to the art of the American South. This presentation will examine the markets for 19th c. Louisiana landscape painting (The Bayou School painters), Impressionist painters of early 20th c. New Orleans, and Modernist painters of mid-20th c. New Orleans and how the values have changed since the late 1990s. The important portrait painters of 19th c. New Orleans will also be discussed.

[ARM/Multi-Discipline]

The Daubert Standard: An In-Depth Review of the Admissibility of Expert Witness Testimony

[R. David Bolls](#), III, LL.M. (Taxation) | Of Counsel | Leigh Law Group P.C.

The in-depth review will provide an outline of the well-known Daubert standards and examine recent case law in order to better assist appraisers to survive Daubert challenges during their expert witness testimony. The review will emphasize the role of the expert witness appraiser, study notable past U.S. Supreme Court cases, examine recent case law opinions and pending appeals which could have an impact on the appraiser's present and/or future standards of practice when substantiating an appraisal opinion as an expert witness.

4:00 - 5:30pm

[Gems & Jewelry]

Precious Metal Hallmarks: Identification, Verification, Location and Dating

[Danusia Niklewicz](#), ASA, GG, FGA, ISA-CAPP | Director of Research & Education | Hallmark Research Institute

William Whetstone | Historical Director | Hallmark Research Institute

A Session for Personal Property and Gems and Jewelry appraisers whether new to or experienced with precious metal hallmarks. Designed to convey a better understanding of important world hallmarks, this intensive class introduces the practice of precious metal hallmarking, what hallmarks mean, and what detailed information they can tell us about the object or jewelry item to be appraised. A hands-on workshop accompanies this session.

[Personal Property]

Blockage, FMV Rental Rates & Fractional Ownership

[Charles Rosoff](#), ASA, MRICS | President | Appraisal Services Associates

Panel of JD, LLM Tax and Art Law attorneys with a CPA to discuss Art Law issues regarding Blockage Discounts, FMV Rental Rates & Fractional Ownership Discounts moderated by Charles Rosoff ASA MRICS.

[ARM/Multi-Discipline]

Necessary Preparation for Depositions and Key Distinctions Between Deposition and Trial Testimony

[Edward "Ed" Kainen](#) | Managing Member | Kainen Law Group, PLLC

The program will focus on the knowledge and skills helpful in successfully preparing to have your deposition taken. It will address the different types of testimony that an expert

witness may offer and focus on the types of testimony that will be most beneficial in a deposition setting as well as the different type of testimony most beneficial in a trial setting. The program will enable the expert witness to skillfully navigate and be successful in both situations.

Tuesday, October 3, 2023

7:40 – 8:25am

[ARM/Multi-Discipline]

Building Trust in the Appraisal Profession

[Robert B. Morrison](#), FASA | Member, Board of Trustees | The Appraisal Foundation

[David Doering](#), ASA | President | Missouri Property Appraisal, Inc.

[David Bunton](#) | President | The Appraisal Foundation

The appraisal profession is facing unprecedented headwinds from the public and from regulatory agencies. Major challenges include the “Silver Tsunami” and a growing scarcity of qualified appraisers, allegations of bias and discrimination in appraisals, and lack of diversity among appraisers. Learn what The Appraisal Foundation is doing to combat these challenges and what you might do to help.

8:30 - 9:30am

[Gems & Jewelry]

State of the Jewelry Industry – Facts, Figures, Future

[Harold Dupuy](#), ASA, FGA, MGA | Vice President, Strategic Analysis | Stuller, Inc.

Can you understand your company's performance in the larger context of the U.S. Jewelry Market? After a better-than-expected pandemic recovery and two years of record growth, the landscape has changed. The jewelry industry faces multiple headwinds from challenging economic and geopolitical conditions. Meanwhile, consumers' buying habits have quickly shifted. Get a macro view of the jewelry industry, including market size, custom jewelry, margins, and pricing trends, the diamond market (both natural and lab-grown), and briefly, the U.S. manufacturing market. Learn about the recent changes, new trends, and, most importantly, what the near-term future of the jewelry industry looks like.

[Personal Property]

Inherited Land: Cracking the Code Using Archival Records

[Beryl F. Hunter](#), M.A. | Asst. Archivist New Orleans Notarial Archives Research Center | Elelyon Cultural Solutions LLC

This presentation will focus on how real property records are protected in government offices and can be researched by the public. These records can be used to determine the current value of the property and can be used to discover the history of the property and who the previous title holders have been. These records stored in archives provide historical insight into how particular agreements on land purchase were executed before notaries.

[ARM/Multi-Discipline]

Post-Pandemic Reality: Working in Remote Teams

[Carlos Lavin](#), ASA, MRICS | President | Appraisals International

[Natalia Szubocsev](#) | Director of Operations and Sales | Appraisals International

Even before the pandemic, most appraisers conducting site inspections and appraisal consultants/subcontractors worked remotely. Since then, many aspects of how we work have changed radically. The US Census shows that between 2019 and 2021, the number of people primarily working from home tripled from 5.7% (9 million people) to 17.9% (27.6 million people). What are the challenges of managing and working with a remote (and global) team? Come and listen to the experiences of the leaders of an appraisal consulting group that enlists team members from four continents (and countless time zones).

9:35 - 10:35am

[Gems & Jewelry]

Lab-Grown Diamonds - Screening Challenges

[Guy Borenstein](#), FGA EGG | Senior Gemologist | Stuller Inc.

Lab-grown diamonds are the hottest trend in recent years. They have become increasingly popular, offering consumers attractive prices and quality options they couldn't afford before.

However, this coin has two sides. In recent years, the industry media repeatedly covered dozens of undisclosed lab-grown diamond issues, demonstrating the increased prevalence of these goods and fueling consumer awareness. In this presentation, we will cover the formation processes of both origins, their visible and non-visible unique properties, the common screening techniques and technologies used for separation, and, most importantly, each technique's limitations and blind spots.

[Personal Property]

Navigating the Secondary American Craft Market Through the Lens of Objects: USA (1969)

[James Zemaitis](#) | Director of Museum Relations | R & Company

It has been more than fifty years since Objects: USA introduced the public to the American studio craft movement with a travelling exhibition featuring works by more than 300 artists which visited dozens of American museums. I will discuss the latest market and institutional developments in American craft including furniture, ceramics, glass, jewelry and textiles. The accompanying catalogue has remained influential to this day, becoming a Bible of sorts for the community of American craft historians, collectors, curators, gallerists, Instagram dealers, and auction house experts. In 2023, American museums continue to unpack the American modern craft movement with exhibitions that blur the boundaries of "fine art" and "craft." Numerous artists featured in Objects: USA have been rediscovered, especially women and artists of color. There has been a corresponding ripple effect on the secondary market, especially for ceramic artists such as Toshiko Takaezu, Doyle Lane and Ruth Duckworth.

[ARM/Multi-Discipline]

Determination of Value in Bankruptcy Proceedings

[Christopher T. Caplinger](#) | Shareholder | Lugenbuhl, Wheaton, Peck, Rankin & Hubbard

The presentation will focus on the unique aspects of valuation of assets, claims, and businesses for various purposes in bankruptcy proceedings. Specifically, the presentation will include a discussion of the importance of both the point in time relevant to the valuation as well as the particular bankruptcy purposes of the valuation. Finally, the

presentation will discuss changes in value and valuation during a bankruptcy case and the role of valuation determinations in different and potential bankruptcy-related litigation and proceedings.

11:00am - 12:30pm

[Gems & Jewelry]

Hallmarks Around the World, an Advanced Session

[Danusia Niklewicz](#), ASA, GG, FGA, ISA-CAPP | Director of Research & Education | Hallmark Research Institute
William Whetstone | Historical Director | Hallmark Research Institute

The Hallmarks Around the World Advanced Session skips the familiar English and French hallmarks to cover those from other hallmarking countries, strong in jewelry production, like Egypt, Israel, Tunisia, India, and many more. This advanced session will encompass concepts in nomenclature through to how regional influences can assist in identifying more of what you are seeing. A hands-on workshop will follow to allow firsthand examination of a range of hallmarks from around the globe.

[Personal Property]

Confronting Documentation Gaps in the Legacies of Black Artists

[Jennifer Mass](#) | President and Founder | Scientific Analysis of Fine Art
[Douglas Bort](#) | Founder/Lead Investigator | Odyssey Global Consulting, LLC
[Renée Vara](#), MA, AAA, USPAP | President & Founder | Vara Art

This panel dissects the current landscapes of art history, conservation, and attribution with studies of post-war artists Alma Thomas and Jean-Michel Basquiat. These artists are haunted by attribution issues commonly found amongst artists of color and their legacies. Within the context of the twentieth-century's indifference, they sold their works without documentation of their corpus. Such lacunae create systemic problems for the art market, making black artists targets for exploitation through fakes and misrepresentations.

[ARM/Multi-Discipline]

THE PERFECT STORM...Convergence of Inflation, Climate Risk and Social Inflation

[Peter Jagger](#) | Managing Director/Senior Vice President | Aon
[Kevin J. Madden](#) | CPSU, ARM Managing Director - Real Estate Practice Leader | Aon
Brian Valery | Director, Risk Management | Empire State Building
[Ed Mazman](#) | Executive Vice President | Ironshore Property Insurance

This presentation panel will provide a multi-discipline perspective on challenges on reported values facing Insurance Brokers, Claim Professionals, Insureds and Underwriter.

1:30 - 2:30pm

[Gems & Jewelry]

Evaluating Jadeite

[Jeff Mason](#), GG | President | Mason-Kay Jade

This presentation will provide an overview of jadeite, and dive into the various aspects that determine the quality and value of jadeite. We will also discuss the treatment of jadeite and common jadeite simulants, as well as review some high-end jadeite sales.

[Personal Property]

A Gumbo of Goods: New Orleans Craftsmen and Retailers

[Lydia Blackmore](#) | Decorative Arts Curator | The Historic New Orleans Collection

Lydia Blackmore, Decorative Arts Curator of the Historic New Orleans Collection, will provide an overview of the craftsmen, retailers, and tastemakers in 19th century New Orleans. From Free Men of Color cabinetmakers to Bordeaux importers, Caribbean silversmiths to New York jewelers, the trade in fine furnishings and tablewares reflected the international tastes of a French/Spanish/American/ Caribbean city. Just as the tastes of New Orleans consumers lean towards the rich and spicy, the furniture and silver available in the city was luxurious in material and design.

[ARM/Multi-Discipline]

Standards of Value - It Impacts All of Us

[Gary R. Trugman](#), FASA, CPA/ABV, MVS | President | Trugman Valuation Associates, Inc.

This session is going to discuss how the standards of value in other disciplines impacts our own valuations, particularly when we must incorporate other types of properties into our work product. Learn what a business appraiser needs depending on the standard of value that may be mandated by certain types of valuations. This session will discuss the importance of understanding the standards of value from the other disciplines when relying on other appraisers' work.

3:00 – 4:00pm

[Gems & Jewelry]

Origin Determination for Colored Stones: (Why) Does it Matter?

[Aaron Palke](#), Ph.D., GG | Sr. Manager, Colored Stone Research | Gemological Institute of America

Geographic origin determination has become one of the major services gemological laboratories provide to the gem and jewelry industry. While origin can be an important part of the story of a gemstone, origin reports issued by gemological laboratories are often used to justify dramatic differences in the value of a stone depending on whether the stone came from a classical or modern source. This presentation will provide an overview of the current state of knowledge of geographic origin determination for colored stones and discuss possible future protocols for origin reporting.

[Personal Property] Seeing Through Paintings

[Rustin Levenson](#), FAIC, FIIC, RAAR | Founder | ArtCare Conservation

This lecture describes how appraisers can use the materials and techniques of paintings to make art historical assessments. It introduces scientific methods of investigation and the history of artist's materials. The lecture will also outline the work of conservators; how they assess condition and treat paintings.

[ARM/Multi-Discipline]

\$80 Billion and 87,000 Additional IRS Employees and Valuation

[Michael A. Gregory](#), ASA, CVA, Qualified Mediator with the Minnesota Supreme Court | Founder and Chief Manager | Michael Gregory Consulting, LLC

The Inflation Reduction Act will provide the IRS \$80 billion additional dollars and will be adding 87,000 employees over the next 10 years. During this session Mike takes a look at the IRS strategic plan, public information available from the Treasury Department and IRS, and shares with you his insights of what this may mean overall related to business

valuation in the IRS Engineering Program where the business valuers are located. Both short term and longer-term implications are presented to give business valuers an idea of what may expect in the future given IRS objectives.

4:05 –5:05pm

[Gems & Jewelry]

From Madagascar with Love

[John Ferry](#) | Founder/CEO | Prosperity Earth

Playing on the words of another epic James Bond film, "From Madagascar with Love" presents demantoid from Madagascar as a new gemstone deposit that has quickly gained global attention for quality and quantities. Gem miner Prosperity Earth stands as a world-leader in sustainable and traceable colored gemstone mining. This presentation highlights the challenges and achievements in mining gemstones in one of the world's most difficult operating environments.

[Personal Property]

The Do's and Don'ts of Charitable Contributions

[Sandra Tropper](#), FASA | Owner | Artemis Inc.

Karin Gross, Esq. | Special Counsel | Internal Revenue Service

[ARM/Multi-Discipline]

Federally Regulated Transactions and USPAP

[Raymond Rath](#), FASA, CEIV™, CFA | Managing Director | Baker Tilly US, LLP

[Carla Glass](#), FASA | Managing Director | Marcum LLP

[Michael H. Evans](#), FASA | President | Evans Appraisal Service, Inc.

This panel will discuss Federally Related Transactions (FRT) - one of the key drivers requiring USPAP compliant valuations. Real estate represents a key discipline where many projects are classified as FRT. Surprisingly, financial reporting valuations, a significant area of practice for many BV appraisers, are not currently classified as an FRT. Our panelists will explore FRTs and USPAP compliance issues.

[Register Now!](#)