



## Monday, September 16, 2024

*CONTENT SUBJECT TO CHANGE*

*All session times noted are U.S. Pacific Daylight Time*

**8:00 - 8:15am**

### **Welcome & Opening Remarks**

[G. Adrian Gonzalez, Jr.](#), ASA, MRICS | President | Adrian Gonzalez & Associates, P.A.

**8:15 - 9:15am**

### **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 Bank of Cleveland, Cincinnati Branch

In this enlightening keynote, Dr. Henry will discuss in detail the current state of the economic environment of the United States. Focus will be made on the current state and outlook for the U.S. GDP and production trends; consumer demand, market sentiment, and financial conditions; U.S. employment and unemployment trends; the outlook for U.S. inflation, and Federal Reserve Monetary Policy, and its implications for interest rates and selected credit markets.

**9:20am – 9:30am**

**[ARM/Multi-Discipline]  
Discipline Welcome**

**9:30 – 10:30am**

**[ARM/Multi-Discipline]**

### **How Appraisers Get into Trouble (and How to Stay Out Of It)**

[Steven F. Bauer](#), Esq. | Attorney and National Claims Counsel for Aspen American Insurance Company | Gaglione, Dolan & Kaplan APC

This program will discuss the most common types of complaints and claims issues facing appraisers today and provide tips for preventing or minimizing exposure to claims. It will also cover recent trends, including discrimination and bias complaints involving appraisers being investigated by federal and state fair housing agencies, etc.

**11:00am – 12:30pm**

**[ARM/Multi-Discipline]**

### **Economic Obsolescence Across Disciplines**

[Lorrie Beaumont](#), FASA | Owner | LB Appraisal Associates, Inc.

[Chris Mellen](#), ASA, MCBA, CVA, ABAR, ICVS, CM&AA | Senior Managing Director | Valuation Research Corporation

Economic Obsolescence – loss in asset value caused by external factors – impacts

appraisals across all disciplines. This cross-discipline session will cover the impact of EO on business, intangible assets, machinery and technical, and real property appraisals. This panel presentation will compare and contrast factors that cause EO, applicability of EO, and measurement of EO from the perspective of each discipline.

1:30 – 2:30pm

**[ARM/Multi-Discipline]**

**Valuing the Future: AI's Revolutionary Impact on Appraisal**

[Scott DeMarco](#), MBA, CBA, CVA, CDFA, CPVA | CEO | Equitable Value LLC

The presentation explores the evolution of Artificial Intelligence (AI) and its profound expected effects on the field of business valuation. It delves into the fundamentals of AI, including its history, technological overview, and specific applications in business valuation calculations, research, and report writing. The presentation also addresses the challenges and ethical considerations of AI in this field, providing a well-rounded view of AI's role in shaping the future of business appraisal. Note: This description was drafted by AI, edited by a human, and proofread by AI.

2:35 – 5:30pm

**[ARM/Multi-Discipline]**

**Expert Appraisers as Expert Witnesses: A Mock Trial Event**

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

[Terri Lastovka](#), ASA, CPA, JD, ARM | Owner | Valuation & Litigation Consulting, LLC

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

[Charles Dixon](#), ASA | President/Owner | CD Valuation Services, Inc.

[Jack Young](#), ASA, CPA | Owner, Senior Appraiser | NorCal Valuation

[J. Mark Penny](#), FASA | Managing Director | Hempstead & Co LLC

[John Rake](#) | Managing Partner | Larkins Vacura Kayser LLP

Attendees from all disciplines are invited to witness appraisers and appraisal reviewers testifying in the hot seat! ASA appraisal professionals will swear under mock oath to testify in various mock lawsuits revolving around a fictional Oregon wildfire disaster, involving multiple disciplines. This extended ARM session will spotlight segments of unscripted testimony with real attorneys using real courtroom strategies. This mock trial session will highlight expert witness testimony based on real world assignments, involving various property types. Mediation, deposition, and courtroom testimony will be featured. This educational event is hosted by the Appraisal Review & Management Committee, which offers POV courses in appraisal review report writing, appraisal management, and litigation services. Plan to attend this mock— yet very realistic— unscripted afternoon....as court will be in session!

**Tuesday, September 17, 2024**

8:00 - 9:00am

**[ARM/Multi-Discipline]**

**Estate & Gift Appraisals Panel**

Robert Schlegel, FASA, MCBA | Principal | Houlihan Valuation Advisors

[Curtis R. Kimball](#), ASA, ARM (BV), CFA | President | Vinewood Investment Analytics Inc.

[Mark Bovee](#), MAI, ASA, CVA | Lead Appraiser | Internal Revenue Service - Large Business International Division

[Christopher Pavilonis](#), CPA (inactive), J.D., L.L.M. | Special Trial Attorney | IRS Office of

Chief Counsel

This panel discussion will explore some of the recent tax court decisions involving appraisals of equity interests and other non-cash gifts. Standards for a qualified appraisal will be discussed, as well as situations where business appraisers need to incorporate appraisals from other disciplines.

9:05 - 10:05am

**[ARM/Multi-Discipline]**

**AI, Ethics, and Valuation: Navigating Complex Terrain**

[Karen M. Lascelle](#), CPA, CVA, CFE | Managing Director | John G. Burk & Associates, CPAs, PC

Explore the intricate intersection of AI, ethics, and valuation in this compelling presentation. In navigating the realm of AI and valuation, avoiding ethical dilemmas requires a proactive approach. Key considerations include ensuring transparency in AI algorithms, addressing bias in data sources, prioritizing privacy protection, and fostering accountability in decision-making processes. By incorporating these principles, practitioners can mitigate ethical challenges and contribute to the responsible and fair application of AI in valuation practices.

10:30am - 12:00pm

**[ARM/Multi-Discipline]**

**Mock Mediation: What Really Matters**

[Barry J. Cunningham](#), Ph.D., ASA, MAI, AI-GRS | CEO | Property Tax Research, LLC

As appraisers, we are sometimes drawn into hostile environments shrouded in cordial banter and usually, though not always, polite talk of the weather. All the while, you know deep down that it's a battle over your opinion versus someone else's. It's fluid and unpredictable. But there are some common denominators regarding process and people. Namely, conflict runs in stages. And personality traits are fairly consistent. This mock mediation is a fun and educational exercise involving volunteers from the class in it usually results in loud laughter.

1:00 - 2:00pm

**[ARM/Multi-Discipline]**

**How Testifying Experts Assist the Trier of Fact**

[Morris R. Borea](#) | Partner | McGivney Kluger Clark & Intoccia, P.C.

2:30 – 3:30pm

**[ARM/Multi-Discipline]**

**Strong ARM: Building your Skillset with ARM Training**

[Charles Dixon](#), ASA | President/Owner | CD Valuation Services, Inc.  
[J. Mark Penny](#), ASA | Managing Director | Hempstead & Co LLC

What is ARM? In the 1980's, when the Appraisal Foundation was developing the first USPAP publication, they recognized the need for qualified appraisal reviews/appraisal reviewers and with common standards, just as USPAP Standards for other appraisal disciplines (RP, BV (intangible assets), Mass, PP. development and reporting). Standard 3 was developed and contained the requirements for review, development, and reporting all in the one Standard (3). Since then, Development and Reporting are their own separate Standards (3 and 4). ARM provides appropriate analyses development for logical reviews and demonstrates competent review writing skills for an understandable presentation,

including protection against defamation. Appraisal Review can help you become a better appraiser, provide an additional income stream for your business, and supports the appraisal profession by increasing public trust in the profession.

**3:35 –4:35pm**

**[ARM/Multi-Discipline]  
Implicit Bias in Valuation**

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

Mike will provide information from various sources related to bias and unconscious bias. Ideas will be presented on how we as individuals and as organizations can take steps to overcome bias. A deeper dive is offered into how we as appraisers can address bias and prejudice in Valuation. As appraisers we can reduce bias by paying attention, having a clear intention to address bias, and take specific actions to reduce bias. These elements are being offered for your consideration for you to be proactive in this area in the future.

[Register Now!](#)