



Monday, October 20, 2025

CONTENT SUBJECT TO CHANGE

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

8:00 - 8:15am

Welcome & Opening Remarks

[Guillermo Ortiz de Zarate](#) | Chief Executive Officer | ASA

[William Engel](#), ASA | President | Strategic Asset Management

8:15 - 9:00am

Keynote Address: Connecting Across Generations

[Scott Zimmer](#) | Generational Expert & Keynote Speaker

Today's workplace brings together as many as five generations, each shaped by distinct experiences and expectations. In this engaging and informative session, keynote speaker Scott Zimmer draws on nearly two decades of research into generational trends to help audiences understand these differences and learn how to bridge them. Through a blend of storytelling, data, and practical strategies, Scott equips teams to communicate more effectively, reduce friction, and collaborate with greater purpose. Attendees will gain a clear understanding of generational values, insight into common challenges, and actionable tips for enhancing communication, engagement, and teamwork—making this session a practical guide to working better together across every age and stage.

9:05am – 9:15am

[Gems & Jewelry]

Discipline Welcome

9:15 – 10:15am

[Gems & Jewelry]

Looking for a Date: Determining the Age of Jewels

[Duncan Parker](#) | Vice President | Dupuis Fine Jewellery Auctioneers

Appraisers are seen as experts in many things. We examine jewels very closely and identify the component parts. Clients are pleased to hear that their appraiser is able to discover some stories about their jewel. In this presentation, we will examine features of construction methods, gem cut styles, fittings and structure that can assist the appraiser in determining the historic age and origins of a jewel. We will also discuss the distinction between original and reproduction jewels.

[ARM/Multi-Discipline]

Valuation In Bankruptcy

[Robert B. Morrison](#), FASA, BV/IA

Hon. Lori V. Vaughan | U.S. Bankruptcy Judge | U.S. Bankruptcy Court for the Middle District of Florida

Mr. Morrison will be joined by the Hon. Lori Vaughan (U.S. Bankruptcy Court, Middle District of Florida) in a discussion of how and when valuation issues arise in bankruptcy proceedings. The discussion will include the ins and outs of practicing in the bankruptcy arena, the nuances of value in bankruptcy matters, and insight from Judge Vaughan regarding the value (pun intended) of credible, well-reasoned expert opinions on value.

10:35am – 12:05pm

[Gems & Jewelry]

Let's Apply Crystals!

[Kerry Gregory](#), FGA, DGA, EG, GG (GIA) | Head of Shiny Stuff | Gemmology Rocks

This is what Kerry calls “Holistic Gemmology”, and no, we’re not talking crystal healing (!). We’ll be looking at how gem reactions and test results are connected to the crystal structure, what features and characteristics we need to consider, and observing the gemstone as a whole. We’ll explore how to apply crystallography for gemmology – but don’t panic: it’s not going to be all sciencey, with slides and slides of Bravais lattices and Miller indices. Instead, we’ll discover how you can use what’s happening inside a gemstone – its crystallography – to take your gemmology to the next level. Using images and videos, Kerry will show you how to use what you SEE in your gem instruments and gemstones to get a more *holistic* view of your gemstones leading to more efficient and accurate IDs - especially with those tricky gemstones that overlap, or with awkward mounted pieces.

[ARM/Multi-Discipline]

When Disciplines Converge: Avoiding Issues in a Complex Multi-Discipline Engagement

[Jeffrey S. Tarbell](#), ASA, CFA | Director | Houlihan Lokey

[Jack Young](#), ASA, ARM, CPA | Senior Valuer | NorCal Valuation

Forrest A. Vickery, ASA | Managing Director - Northern California | Sanli Pastore & Hill

Multi-discipline engagements can be particularly complex, with potential challenges that can be avoided with proper planning, communication, and teamwork. The panelists will draw upon their collective experience to provide a road map to successful outcomes in cross-discipline appraisal projects. Presented in a case-study format, the session will address issues including: assignment scope, subcontracting, definition of value, diligence, intra-appraiser communication, protocols for communication with legal counsel, appraisal review, and reporting requirements.

1:05 – 2:05pm

[Gems & Jewelry]

Objectivity in the Aftermath: The Appraiser’s Guide to Assisting Clients, Preparing for Inspections, and Working with Insurance Companies After Catastrophe

[Thomas Dawson](#), ASA | Resonance Appraisals

As catastrophic events increase in frequency, the demand for appraisers to deliver objective, and defensible reports under challenging circumstances is rising. This session led by an insurance professional turned appraiser provides a practical guide for appraisers called upon to serve in the wake of disaster.

[ARM/Multi-Discipline]

The Ins and Outs of AVMs... and Ethics too

Robert Schlegel, FASA | Principal | Houlihan Valuation Advisors

[Penny Lutocka](#), ASA, CPA/ABV, CFE | Principal | Houlihan Valuation Advisors

This session provides a brief survey of how Automated Valuation Models (AVMs) are being utilized across various disciplines, with a primary focus on real property and their expanding use in machinery, equipment, and business valuation. We will explore the growing influence of AI in AVM operations, examine shortcomings in market and income analysis methods, and discuss key considerations for reviewers when assessing AVM-generated value indications. Highlights of the various statements concerning AVM usage will also be discussed.

2:10 – 3:10pm

[Gems & Jewelry]

Watching the Market: Current Trends in the Watch Industry

[Reginald Brack](#) | SVP, Head of Dept., Watches | Freeman's Hindman Auction House

We will explore the dynamic landscape of the luxury watch sector, and discover the latest trends, discuss Rolex and its impact on the market, and revisit best practices for valuation and authentication. We will encourage a robust Q & A session, so please bring your questions!

[ARM/Multi-Discipline]

AI, Ethics and Standards: Annual Update

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

Stay informed on the evolving landscape of AI, ethics, and professional standards in this annual update. This presentation highlights recent developments, explores ethical considerations in AI integration, and reviews key standards shaping practice. Gain actionable insights to navigate challenges and maintain accountability in the dynamic world of AI-driven decision-making.

3:30 - 4:30pm

[Gems & Jewelry]

Latest Updates on Lab Grown Diamonds and Screening Technologies

[Guy Borenstein](#) | Director of Gemstone Procurement and Senior Gemologist | Stuller Inc.

Indistinguishable to the trained eye, lab-grown diamonds have caught the consumer's attention, fueling meteoric growth over the past several years. This presentation will cover the latest developments and tweaks in lab-grown diamond production, their new challenges, and the standard screening technologies used for their separation. Each technique's strengths and limitations will be explored, based on Stuller's multi-million stones screening research experience. In addition, some rare and interesting cases uncovered by the Stuller Gemological Laboratory and current research projects will be presented.

[ARM/Multi-Discipline]

Economic Obsolescence: An ARM Understanding

[Michael Salvatore](#), Jr. | ASA, CEA, MPPA, SPA | President, Senior Appraiser | Kingfish Capital Advisors, LLC

What is Economic Obsolescence, and why does it matter in an appraisal review? This session will explore the concept from the perspective of the Appraisal Review and Management (ARM) discipline. Attendees will learn how to define and recognize economic obsolescence, identify where it may be hidden within appraisal reports, and spot key words and concepts that signal its presence. Whether you're reviewing reports or preparing them, this session will sharpen your skills and help you navigate this often-

overlooked element with confidence.

Tuesday, October 21, 2025

8:00 - 9:00am

[Gems & Jewelry]

Jewelry Industry Insights ... Perception & Reality

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

This session offers a comprehensive survey of today's jewelry industry, navigating through challenging economic and geopolitical times. It provides a macro view, covering market size and growth, competitive and economic influences, total retail market, eCom penetration, customization trends, product margins, precious metals forecast, seasonality shifts, the natural and lab-grown diamond market dilemma, and a brief overview of the U.S. manufacturing sector. You will learn about recent market developments, new trends, and economic factors influencing the business. This session is a must-attend for those who want to understand the jewelry industry's current state and its long-term future.

[ARM/Multi-Discipline]

Panel on IRS Valuation Issues

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

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

[Michael A. Perlmutter](#), JD, CPA, CVA, ABAR | Managing Director | Perlmutter Law and Valuation, Inc.

This panel discussion is a continuation of the presentation at the Portland 2024 conference. Subjects will include the present organization structure of the IRS and how appraisers in different disciplines interact with IRS professionals. Additional topics will expand on the earlier 2024 topics, including "Qualified Appraiser," recent conservation easements issues, and recent tax court decisions such as CECIL. New topics will reflect incorporating appraisals from other disciplines in complex gift and estate filings, and avoiding questionable appraisal methodology and interpretation of discount evidence. Time will be available for questions.

9:35 - 10:35am

[Gems & Jewelry]

Pearls: How Books Can Unlock Insights for Mastering Pearls Appraisal

Sarah Senzer | Gemologist GG FGA & Pearl Expert GP CPAA | ASA - NAJA - WJA - Gem-A – AGA

We will explore how a single, well-chosen book from your library can be a transformative resource in mastering appraisal. By diving into one key anecdote or historical insight, we'll demonstrate how these unique stories not only enrich your understanding of pearls but also sharpen your ability to assess their quality, provenance, and value. This session will emphasize how integrating technical knowledge into your practice can elevate your expertise, and provide a perspective on the preciousness of pearls. Whether you're a senior appraiser or just starting out, this talk will show you how books can unlock dimensions in your pearl appraisal.

[ARM/Multi-Discipline]

Active Listening: Enhancing Communication Skills to Benefit You and Your Clients

[David N. Horowitz](#), Esq. | Attorney | Warner Angle Hallam Jackson & Formanek PLC

Effective communication starts with active listening—a skill that strengthens relationships, fosters understanding, and enhances problem-solving. We will define the key elements of active listening, why it matters, and how it benefits you in work - and life.

11:00am - 12:00pm

[Gems & Jewelry]

Let's See Applied Crystallography in Practice

[Kerry Gregory](#), FGA, DGA, EG, GG (GIA) | Head of Shiny Stuff | Gemmology Rocks

This hands-on workshop will give you the opportunity to put into practice the theory of applied crystallography. Working through a carefully curated selection of gemstones, that show you just what you need to learn efficiently – you will see in person what happens inside the gems and with testing equipment. How does the light move differently in a biaxial to uniaxial gemstone? Where should you expect an interference figure in an aquamarine? What does it mean if only the lower value reading on a refractometer moves? You'll *see* the answers to these questions and more, and more importantly you'll learn when to use these techniques, and how they can make your gemology, quicker and more accurate in your working practice.

[ARM/Multi-Discipline]

Avoiding Sharks in Mediation Waters

[Jeffrey W. Brend](#), JD, CPA/ABV, ASA, CFE, CFF, AAML, IAFL, CDFA | Attorney | Levin & Brend, P.C.

The sharks will be circling to learn the weaknesses in your report in the allegedly safe waters of mediation. You'll learn the fundamentals of the allegedly confidential mediation process, how to help your attorney negotiate in mediation and timing the disclosure of your work product and avoiding the undercurrents and chum in the water.

1:00 - 2:00pm

[Gems & Jewelry]

Fighting Fakes in an AI World

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

Machine learning, computer vision, and Chatbots; Artificial intelligence is helping fraudsters make more convincing counterfeits. Experts and appraisers are also harnessing the power of AI to flag fraud by analyzing images and provenance. Computer Vision scours the web, delivering accurate comparables in record time. Machine learning streamlines research, analyzes data, and compiles briefs with ease. Sensor-ledger technology digitally connects items for flawless provenance. Applicable to all specialties, you will hear some amazing case studies, see new tools and tricks, and learn the benefits these new technologies offer. Not for an item's past, but for a treasure's future.

[ARM/Multi-Discipline]

From Review to Resolution: Integrating Opinions of Value in Appraisal & Valuation Reviews

[Jack Young](#), ASA, ARM, CPA | Senior Valuer | NorCal Valuation

SPAP SR 3.4 provides essential guidance for combining appraisal reviews and opinions of value in a single report. Applied effectively, this provides a clear path from identifying issues in an appraisal to resolving them, offering valuable clarity for courts and other stakeholders. This presentation will look at using standards, three and four to present a review report with an opinion of value that is clear and understandable to the client, intended user, and any other unintended users such as the court.

2:05 – 2:55pm

[Gems & Jewelry]

A Golden Era: Jewelry of the 1940s

[Elizabeth Bray](#) | Owner | Sparrow Jewels

Jewelry from the 1940s, often referred to as “Retro” is uniquely glamorous, whimsical and dramatic. The jeweled creations of the time period perfectly capture the highs and lows of that particular moment in history and serve as a way to better understand our culture and fashion today.

[ARM/Multi-Discipline]

How to Survive A Cyber Attack

[John Jackson](#) | CEO & Founder | Bytagig

41% of Small Businesses fell victim to cyber-attacks in 2023. 60% of Small Business do not survive following a cyber-attack. Hear real world examples of cyber-attacks and learn essential steps your business needs to take to ensure you remain resilient following a cyber-attack. Learn how to prepare for, respond to, and recover from cyber-attacks to remain profitable and secure.

3:15 – 4:05pm

[Gems & Jewelry]

The Current Global Gem Markets: What’s Available and at What Price, from the Mines to the Markets

[Gary Roskin](#) | Editor in Chief | Roskin Gem News

Gain insight into the ever-evolving global gem markets in this engaging session that follows the journey of gemstones from their source to final sale. We’ll explore how political, environmental, and economic forces are shaping mining operations and affecting gem availability worldwide. The discussion will also examine the different market paths—wholesale, auctions, online, and retail—and how they influence pricing and demand. Beyond monetary value, we’ll look at the broader “price” paid in terms of ethics, sustainability, and the growing demand for responsible sourcing, including traceability and transparency. This session offers a comprehensive view of what’s available in today’s gem markets—and the true cost of bringing these treasures to consumers.

[ARM/Multi-Discipline]

USPAP and IVS: Do I have to Choose?

[Barry J. Shea](#), ASA, IFA, ARM | Principal | Barry Shea and Associates

[Thomas Boyle](#), MAI | Senior Vice President, Chief Appraiser | US Bank

In this informative session, the presenters will provide a concise yet thorough comparison of two key valuation standards, highlighting their unique features and common ground. They will walk attendees through practical strategies for applying both standards within

the same assignment, ensuring compliance without sacrificing quality or accuracy. The session will include real-world examples and actionable insights to help appraisers navigate dual standard requirements with confidence. Ample time will be reserved for an interactive Q&A, where attendees can engage directly with the presenters and clarify any questions or challenges they face in their own practice.

4:10 –5:00pm

[Gems & Jewelry]

Identifying Natural Diamonds, Synthetics, and Simulants: Techniques for Jewelry Professionals

[Trang Pham](#), GIA GG, ASA, MGA® | Owner | La Jolla Gem Appraisal

This presentation equips jewelry professionals with knowledge and techniques to accurately identify natural diamonds, synthetics, and simulants. Attendees will learn about the characteristics of each type, how to observe and identify them using standard gemological equipment, and when advanced testing is required for clear distinctions. The session also emphasizes understanding the limitations of standard methods, the importance of accurate identification in building client trust, and maintaining the highest standards in diamond appraisal.

[ARM/Multi-Discipline]

Reviewing Litigation Reports

[Gregory Patterson](#), ASA, ARM | Director - Special Projects | HDH Advisors

[Brian Crotty](#), ASA, ABV, CVA, CBA, CFE, CDFA | Managing Director | HDH Advisors

Applying USPAP Standard 3 beyond traditional "appraisals." Presenting the good, the bad, and the ugly in a variety of litigation reports attempting to place a measure on damages.

[Register Now!](#)