



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

[Personal Property]

Discipline Welcome

9:15 – 10:15am

[Personal Property]

The Importance of Provenance: The Current Market for Indian, Himalayan, and Southeast Asian Works of Art

[Sandhya Jain-Patel](#), AAA | Principal Art Advisor and Appraiser | Sandhya Jain-Patel, LLC

This presentation will address the complex intersection of provenance research, market value, and ethical considerations in the Indian, Himalayan, and Southeast Asian art market. As this specialized field faces increased scrutiny over object histories and ownership, appraisers must adapt their methodologies to address these challenges while maintaining professional standards.

[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

[Personal Property]

Latinx & Puerto Rican Art on the Rise: Innovators, Shifting Trends, and Market Growth

[Maria C. Gaztambide](#), Ph.D. | Executive Director | Museo de Arte de Puerto Rico

[Diego Figueroa-Rodriguez](#) | Of Counsel | DLA Piper LLP (US)

Christopher Rivera | Director and Co-Founder | EMBAJADA

[Andrea M. Zorrilla](#), AAA | Founder | AMZ Art Advisory & Appraisals, LLC

Don't miss this dive deep into the dynamic and evolving world of Latinx and Puerto Rican fine art and craft, exploring its history, emerging trends, and the cultural forces driving its expansion. Join María Cristina Gaztambide, Executive Director of the Museo de Arte de Puerto Rico, alongside Diego Figuerosa Rodriguez—philanthropist, collector, and board member of the Museo de Arte de Puerto Rico and the Museum Trustee Association—and Christopher Rivera, artist and cofounder of Puerto Rico's most electrifying international gallery, Embajada for this exclusive inside look at the pulse of a growing creative movement.

[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

[Personal Property]

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

**[Personal Property]
Fair Use & Visual Art**

[Sammetria L. Goodson](#), Esq. | Managing Attorney | Goodson Law PLLC

Join Art Lawyer Sammetria Goodson for a presentation regarding fair use doctrine and how this doctrine applies to the visual arts. Attendees will learn about copyright enforcement in the age of digital art and AI, and how current litigation is shaping the future of fair use.

**[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

**[Personal Property]
7 Reasons Why Good Prospects Vanish After 'Great' Meetings**

Claire Mayweather | Owner and President | Sandler by Sales Success Solutions

This session explores the common pitfalls that cause potential clients to lose interest—even after a positive first conversation. Tailored for personal property appraisers, this session highlights why prospects sometimes go silent, and provides practical strategies to build trust, maintain engagement, and turn strong first meetings into lasting business relationships.

**[ARM/Multi-Discipline]
Economic Obsolescence: An ARM Understanding**

[Michael Salvadore](#), 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.

8:00 - 9:00am

[Personal Property]

Art Fairs - Exploring the Many Possible Benefits of Using the Art Fair Venue as an Important Research Tool in Professional Appraisal Research

[Jeremy Stone](#), ASA | Founder and Managing Director | Business Matters in the Visual Arts LLC

[Frances Zeman](#), FASA | President, Head Appraiser, Senior Projects Manager | Appraisal Resource Associates, Inc.

[Gabrielle Selz](#), AM | President/Owner/Appraiser | Selz Fine Art Appraisals

Art fairs have become a vital source of information for primary and secondary sales in the gallery level of trade. Not only are the galleries clustered in one or more related/satellite locations, they also offer art and design appraisers an invaluable opportunity to collect and compare data for market trends, buyer demand, and pricing dynamics. This session will explore strategies for maximizing engagement with art fair participants from pre-fair preparation, on-site research, interacting with and building valuable networking relationships with dealers, including discussions of onsite sales strategies, as well as with post-fair follow-ups. Some of the fairs discussed will include Art Basel Miami Beach and Art Miami, ADAA, The (various) Armory Shows and TEFAFS, Friezes, and FOG Design+Art. Panel attendees will gain actionable insights to refine their appraisal techniques and enhance their abilities in market analysis.

[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

[Personal Property]

Preparing Reports for the IRS: Two Views

Sandra Tropper, FASA | Instructor/Examiner | Artemis, Inc.

Robin Bonner | Fine Art Appraiser | Bonner Arts LLC

Join valuation expert Sandie Tropper as she highlights common pitfalls found in appraisal reports submitted to the IRS, drawn from her extensive experience reviewing real-world cases. She'll share practical insights into what works—and what doesn't—when preparing reports for tax-related purposes. Adding a unique perspective from inside the agency, retired IRS employee Robin Bonner will share memorable examples of both exemplary and problematic submissions encountered during her tenure. Together, they'll

offer valuable takeaways to help you strengthen your compliance and reporting practices.

[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

[Personal Property]

Island Currents: Appraising Caribbean Contemporary Art in a Global Context

[Dr. Donna Thompson Ray](#) | Appraiser | ATFA Appraisals

Market studies of artists living and producing work in the Caribbean archipelago and its diaspora locations lack integrated and sustained attention. For artists who reach six and seven-figure results at auction and private sales, their hard-won path to success is shaped by the dominant culture's acceptance of their differences: Afro-descendent, Indigenous, first language, alternative religious practice, and gender orientation. Where do they fit in? This session will examine the recent market of three contemporary Caribbean/Caribbean American artists from Haiti, Jamaica, and Puerto Rico. We will explore how these artists speak to the "Caribbean Contemporary" and what factors shape their market attention.

[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

[Personal Property]

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

[Personal Property]

Appraising Archives: Essentials and Expert Insights

[John V. Henley](#), ASA | Governor, ASA | John V. Henley, LLC

At some point in their careers, nearly every appraiser will encounter archives, whether they're ready or not. This session introduces new appraisers to what archives are and why they matter. For seasoned professionals, it offers a real-world case study and reveals practical tips and techniques, the "tricks of the trade", to navigate the unique challenges of archive appraisal with confidence and skill.

[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

[Personal Property]

Black American Contributions in American Decorative Arts

Lauren Cross, Ph.D. | Gail-Oxford Associate Curator of American Decorative Arts | The Huntington

In this presentation, participants will learn the wide-spread contributions of Black American artists in the history of American Decorative Arts and Craft from enslaved artisans to mid-century and contemporary artists and craftspeople. The researcher will unpack growing market trends, including recent and upcoming exhibitions, research, and findings that have supported the emerging demand on these important works of art.

[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

[Personal Property]

Rags and Riches: Valuing Fashion History

[Annette Becker](#) | Director | Texas Fashion Collection, University of North Texas College of Visual Arts and Design

From blockbuster exhibition attendance numbers to record-breaking hammer prices at auctions, fashion artifacts are capturing the public's imaginations and are increasing in cultural and financial value. Learn more about the confluence of collectors, collecting institutions, fashion brands, auction houses, clothing resale sites, and popular media creating this meteoric rise - and what we might anticipate in fashion's future!

[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!](#)