



*\*\*SCHEDULE SUBJECT TO CHANGE\*\**  
*\*ATLANTIC STANDARD TIME\**

**SATURDAY, OCTOBER 18**

8:00am - 1:00pm		
	GOLF OUTING	
8:00am-5:00pm	BOARD OF GOVERNORS MEETING	

**SUNDAY, OCTOBER 19**

9:00 - 10:00am		
	ALL DISCIPLINE COMMITTEE MEETING	
10:00am - 4:00pm	DISCIPLINE COMMITTEE MEETINGS	
3:00 - 7:30pm	REGISTRATION OPEN	
4:30—6:30p,	CHAPTER LEADERSHIP ROUNDTABLE	
5:30 - 6:00pm	ANNUAL BUSINESS MEETING	
6:30 - 7:30pm	WELCOME RECEPTION	



**MONDAY, OCTOBER 20**

BUSINESS VALUATION 1		BUSINESS VALUATION 2		MACHINERY & TECHNICAL SPECIALTIES	PERSONAL PROPERTY	GEMS & JEWELRY	REAL PROPERTY	APPRAISAL REVIEW & MGMT MULTI-DISCIPLINE
REGISTRATION & CONTINENTAL BREAKFAST								
Introduction & Opening Remarks								
Keynote Address: Strategies for a Thriving Multigenerational Workplace <i>Scott Zimmer</i>								
Session Change Break								
Discipline Welcome		Discipline Welcome	Discipline Welcome	Discipline Welcome	Discipline Welcome	Discipline Welcome	Discipline Welcome	
DLOM Term Structure: An Updated Model for Estimated Discounts or Lack of Marketability <i>John Finnerty</i>		Drugs and Hugs: Pharmaceutical Industry Overview <i>Joshua Abbey</i>	The Importance of Provenance: The Current Market for Indian, Himalayan and Southeast Asian Works of Art <i>Sandhya Jain-Patel</i>	Looking for a Date: Determining the Age of Jewels <i>Duncan Parker</i>	Old Parrots Learning to Talk <i>Jeffrey Rauland, ASA</i>	Valuation in Bankruptcy <i>Robert Morrison, FASA</i> <i>Hon. Lori Vaughan</i>		
NETWORKING BREAK								
Drama in the Boardroom: Dissenting Shareholder Valuation Live Action Case Study <i>Vanessa Claiborne, ASA</i> <i>Nene Gianfala, ASA</i>	Valuation Battles: Navigating Key Issues, Levers, and Court Responsibilities in Disputes <i>Neil Beaton, ASA</i>	CNC Machinery: Milling Back the Layers of Value Today and Tomorrow <i>Jeffrey Miller, ASA</i> <i>Randall Baumbach</i>	Latinx & Puerto Rican Art on the Rise: Innovators, Shifting Trends, and Market Growth <i>Maria Gaztambide</i> <i>Diego Figueroa-Rodriguez</i> <i>Christopher Rivera</i>	Let's Apply Crystals! <i>Kerry Gregory</i>	AI in Valuation One Year Later: Progress, Challenges & Opportunities <i>Kevin Couillard, ASA</i> <i>Greg Endicott, ASA</i>	When Disciplines Converge: Avoiding Issues in a Complex Multi-Discipline Engagement <i>Jeffrey Tarbell, ASA</i> <i>Jack Young, ASA</i> <i>Forrest Vickery, ASA</i>		
INTERNATIONAL AWARDS LUNCHEON								





**MONDAY, OCTOBER 20**

BUSINESS VALUATION 1	BUSINESS VALUATION 2	MACHINERY & TECHNICAL SPECIALTIES	PERSONAL PROPERTY	GEMS & JEWELRY	REAL PROPERTY	APPRAISAL REVIEW & MGMT MULTI-DISCIPLINE
<b>Recent Delaware Valuation Cases - Issues for Experts and Valuers</b> <i>Gil Matthews</i>	<b>[Fair Value] Volatility Adjustments: One Size Doesn't Fit All</b> <i>Marina Kagan</i> <i>Seema Ranka</i>	<b>Fundamental, Often Understated Assumptions in Appraisals</b> <i>John Emory Jr.</i>	<b>Assisting Clients, Preparing for Inspections, and Working with Insurance Companies After Catastrophe</b> <i>Thomas Dawson, ASA</i>	<b>Assisting Clients, Preparing for Inspections, and Working with Insurance Companies After Catastrophe</b> <i>Thomas Dawson, ASA</i>	<b>Fundamental, Often Understated Assumptions in Appraisals</b> <i>John Emory Jr.</i>	<b>The Ins and Outs of AVMs... and Ethics too</b> <i>Robert Schlegel, FASA</i> <i>Penny Lutocka, ASA</i>
Session Change Break						
<b>Is Your BV Report Ready for the Tax Court?</b> <i>Bruce Johnson, ASA</i>	<b>[Fair Value] AICPA Cheap Stock Guide</b> <i>William Johnston ASA</i> <i>Adam Smith, ASA</i>	<b>Valuing Green Assets: An MT&amp;S Perspective</b> <i>Tim Howard, ASA</i> <i>James Fox, ASA</i>	<b>Fair Use &amp; Visual Art</b> <i>Sammetria Goodson</i>	<b>Watching the Market: Current Trends in the Watch Industry</b> <i>Reginald Brack</i>	<b>From Panic to Plan: Handling a Complaint from Your State Appraisal Board</b> <i>William Wilson, FASA</i>	<b>AI, Ethics and Standards: Annual Update</b> <i>Karen Lascelle</i>
NETWORKING BREAK						
<b>The Economy and Cost of Capital Post-Trump – Quo Vadis?</b> <i>Carla Nunes</i>		<b>Steel Mill Valuations for Insurance</b> <i>Chris Sytsma, ASA</i>	<b>Art Crime: The Curious Case of the Clementine Hunter Forgeries</b> <i>Randolph J. Deaton, IV</i>	<b>Latest Updates on Lab Grown Diamonds and Screening Technologies</b> <i>Guy Borenstein</i>	<b>DCF Applied to Non-Stabilized Property: Market Value or Investment Value?</b> <i>Martin Skolnik</i>	<b>Economic Obsolescence</b> <i>Michael Salvatore, ASA</i>
END OF DAY 1						
Power Networking Hour						
Rising Stars Happy Hour International Virtual Chapter Reception						

# Schedule At A Glance



## TUESDAY, OCTOBER 21

	BUSINESS VALUATION 1	BUSINESS VALUATION 2	MACHINERY & TECHNICAL SPECIALTIES	PERSONAL PROPERTY	GEMS & JEWELRY	REAL PROPERTY	APPRAISAL REVIEW & MGMT MULTI-DISCIPLINE
7:00 - 8:00am	CONTINENTAL BREAKFAST						
8:00 - 8:45am	<b>Panel on IRS Valuation Issues</b> <i>Robert Schlegel, FASA Curtis Kimball, ASA Michael Perlmutter</i>	<b>A Panel Discussion on Practice Management</b> <i>PJ Patel, ASA William Johnston, ASA Laurie-Leigh White, ASA</i>	<b>Equipment Finance and External Appraisers</b> <i>Philip Lavis, ASA</i>	<b>The Role of Art Fairs in Art Appraisal Research</b> <i>Gabrielle Selz, AM Jeremy Stone, ASA Fran Zeman, FASA</i>	<b>Jewelry Industry Insights ... Perception &amp; Reality</b> <i>Harold Dupuy</i>	<b>From Appraiser to Valuation Analyst: A Data-Driven Evolution</b> <i>Jason Tillema, ASA</i>	<b>Panel on IRS Valuation Issues</b> <i>Robert Schlegel, FASA Curtis Kimball, ASA Michael Perlmutter</i>
8:45 - 9:30am			<b>Mining Industry M&amp;E Overview and Valuation Considerations</b> <i>Philip Lavis, ASA</i>				
9:30am	Session Change Break						
9:35 - 10:35am	<b>Connelly v. United States and a Brief Overview of Current Issues in the Gift and Estate Tax World</b> <i>Z. Christopher Mercer, FASA</i>	<b>Dichotomy of a Complex Valuation Case: Divergence to Agreement</b> <i>Kenneth Pia, ASA Kyleigh Weinfurter</i>	<b>Special Circumstances in Performing Aircraft Appraisals</b> <i>Ed Van Winkle</i>	<b>Preparing Reports for the IRS: Two Views</b> <i>Sandra Tropper, FASA Robin Bonner</i>	<b>Pearls: How Books Can Unlock Insights for Mastering Pearls Appraisal</b> <i>Sarah Senzer</i>	<b>Bias in Eminent Domain Appraising</b> <i>Byron Miller, ASA</i>	<b>Active Listening: Enhancing Communication Skills to Benefit You and Your Clients</b> <i>David Horowitz</i>
10:35 - 11:00am	NETWORKING BREAK						
11:00 - 12:00pm	<b>From Gut instinct to Algorithms: AI impact on Future BV</b> <i>Hernando Gomez, ASA</i>	<b>Hot Topics Panel</b> <i>Carla Nunes Jay Fishman, FASA</i>	<b>Power Behind the Cloud: Valuing Data Centers and Energy Systems</b> <i>Mike Peterson, ASA</i>	<b>Market Studies Caribbean Art</b> <i>Dr. Donna Ray</i>	<b>Let's See Applied Crystallography in Practice</b> <i>Kerry Gregory</i>	<b>Methods of Developing Market Conditions Adjustments</b> <i>Shane Weber</i>	<b>Avoiding Sharks in Mediation Waters</b> <i>Jeffrey Brend , ASA</i>
12:00 - 1:00pm	BUSINESS VALUATION LUNCH		LUNCH ON OWN				





**TUESDAY, OCTOBER 21**

	BUSINESS VALUATION 1	BUSINESS VALUATION 2	MACHINERY & TECHNICAL SPECIALTIES	PERSONAL PROPERTY	GEMS & JEWELRY	REAL PROPERTY	APPRAISAL REVIEW & MGMT MULTI-DISCIPLINE
1:00 - 2:00pm	<b>Advanced Topics in ESOP Valuations</b> <i>Laurie-Leigh White, ASA</i> <i>Patrice Ragdona, ASA</i>	<b>Incorporating Operating and Finance Leases</b> <i>John Benedetti</i> <i>Rick Daubenspeck, ASA</i>	<b>Incorporating Operating and Finance Leases</b> <i>John Benedetti</i> <i>Rick Daubenspeck</i>	<b>Fighting Fakes in an AI World</b> <i>Graham Wetzberger</i>	<b>Fighting Fakes in an AI World</b> <i>Graham Wetzberger</i>	<b>Getting It Wright: Valuing Historic Frank Lloyd Wright Designed Homes</b> <i>Emily Bramen</i>	<b>From Review to Resolution: Integrating Opinions of Value in Appraisal &amp; Valuation Reviews</b> <i>Jack Young, ASA</i>
2:00pm	Session Change Break						
2:05 - 2:55pm	<b>Financial and Risk Characteristics of Smaller Firms</b> <i>Michael Crain</i>	<b>Valuation Issues with Private Equity Interests</b> <i>Quinn Shearer, ASA</i> <i>Dan Daitchman, ASA</i>	<b>The Premise of Value and Installation Costs</b> <i>Kent Amarante, ASA</i>	<b>The Art Conservators Inspections after a Natural Disaster</b> <i>Viviana Dominguez</i>	<b>A Golden Era: Jewelry of the 1940s</b> <i>Elizabeth Bray</i>	<b>Hopping Into the Value of Brewery Assets</b> <i>Erin McKay, ASA</i> <i>Carlos Lavin, ASA</i>	<b>Cyber Security</b> <i>John Jackson</i>
2:55 - 3:15pm	Networking Break						
3:15 - 4:05pm	<b>Synthetic Credit Rating and the Cost of Debt</b> <i>Todd Fries, ASA</i> <i>Stephen Jaquess</i>	<b>SEC Valuation Enforcement Cases and Valuation Best Practices</b> <i>Antonella Puca</i> <i>Shaun Maloney</i>	<b>Intersection of BV and MTS Appraisal Work</b> <i>Doug Krieser, FASA</i> <i>Robert Schlegel, FASA</i>	<b>Sacred Aesthetics: Understanding the Value of Religious Art and Objects</b> <i>Dr. Scott Peck</i>	<b>The Current Global Gem Markets: From the Mines to the Markets</b> <i>Gary Roskin</i>	<b>Adjustments to Capitalization Rates: Why Not</b> <i>Martin Skolnik</i>	<b>USPAP and IVS: Do I have to Choose?</b> <i>Barry Shea, ASA</i> <i>Tom Boyle</i>
4:05pm	Session Change Break						
4:10 - 5:00pm	<b>Working Capital Considerations for Valuations</b> <i>Raymond Rath, FASA</i>	<b>How the IVSC is Expanding the Global Valuation Profession</b> <i>Drew Dorweiler, ASA</i>	<b>Semiconductor and Quantum Computer Appraisal: Practical Methods for Complex Valuation</b> <i>Erin McKay, ASA</i> <i>Carlos Lavin, ASA</i>	<b>Rags and Riches: Valuing Fashion History</b> <i>Annette Becker</i>	<b>Identifying Natural Diamonds, Synthetics and Simulants: Techniques for Jewelry Professionals</b> <i>Trang Pham, ASA</i>	<b>More Than Just Location</b> <i>Mark Poechman</i>	<b>Reviewing Litigation Reports</b> <i>Gregory Patterson, ASA</i> <i>Brian Crotty, ASA</i>
5:00pm	Conference Adjourns						
5:00 - 6:00pm	Farewell Reception						