



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
2:30—4:30pm	Coastal Cleanup Volunteer Activity
3:00 - 7:00pm	REGISTRATION OPEN
4:30—6:30pm	CHAPTER LEADERSHIP ROUNDTABLE
5:30 - 6:00pm	ANNUAL BUSINESS MEETING
6:00 - 7:00pm	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
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: Contested 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
Recent Delaware Valuation Cases - Issues for Experts and Valuers <i>Gil Matthews</i>	[Fair Value] Volatility Adjustments: One Size Doesn't Fit All <i>Marina Kagan</i> <i>Seema Ranka</i>	Fundamental, Often Understated Assumptions in Appraisals <i>John Emory Jr.</i>	Assisting Clients, Preparing for Inspections, and Working with Insurance Companies After Catastrophe <i>Thomas Dawson, ASA</i>	Assisting Clients, Preparing for Inspections, and Working with Insurance Companies After Catastrophe <i>Thomas Dawson, ASA</i>	Fundamental, Often Understated Assumptions in Appraisals <i>John Emory Jr.</i>	The Ins and Outs of AVMs... and Ethics too <i>Robert Schlegel, FASA</i> <i>Penny Lutocka, ASA</i>
Session Change Break						
Is Your BV Report Ready for the Tax Court? <i>Bruce Johnson, ASA</i>	[Fair Value] AICPA Cheap Stock Guide <i>William Johnston ASA</i> <i>Adam Smith, ASA</i>	Valuing Green Assets: An MT&S Perspective <i>Tim Howard, ASA</i> <i>James Fox, ASA</i>	Fair Use & Visual Art <i>Sammetria Goodson</i>	Watching the Market: Current Trends in the Watch Industry <i>Reginald Brack</i>	From Panic to Plan: Handling a Complaint from Your State Appraisal Board <i>William Wilson, FASA</i>	AI, Ethics and Standards: Annual Update <i>Karen Lascelle</i>
NETWORKING BREAK						
The Economy and Cost of Capital Post-Trump – Quo Vadis? <i>Carla Nunes</i>		Steel Mill Valuations for Insurance <i>Chris Sytsma, ASA</i>	Appraisers, Agents & Artifacts: Navigating Fraud, Theft, and Scams with the FBI <i>Robert Giczy</i>	Latest Updates on Lab Grown Diamonds and Screening Technologies <i>Guy Borenstein</i>	DCF Applied to Non-Stabilized Property: Market Value or Investment Value? <i>Martin Skolnik</i>	Economic Obsolescence <i>Michael Salvatore, ASA</i>
END OF DAY 1						
Power Networking Hour						
Rising Stars Happy Hour (invitation only) International Virtual Chapter Reception (invitation only)						

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

Schedule At A Glance



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