



October 4-6 | Fort Worth, Texas | In Person & Virtual

# Schedule

Appraisal Review & Management



## Monday, October 5, 2026

*CONTENT SUBJECT TO CHANGE*

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

**8:00 – 8:15am**

### **Welcome & Opening Remarks**

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

Carol Akers Klug, ASA | Sole Practitioner | Carol Akers Klug ASA MBA

**8:15 – 9:15am**

### **Keynote Address: How to be More Interesting Than a Cell Phone**

[Deedre Daniel](#) | Founder | The Interesting Conversations Company®

In a world of constant distraction, how do you ensure your message actually lands? In this high-energy, research-driven session, Deedra Daniel shares practical strategies to capture attention, communicate with clarity, and stand out in any professional setting—from client meetings to the courtroom. Attendees will leave with immediately applicable tools to strengthen connections, enhance presence, and make complex ideas more engaging and memorable.

**9:20 – 9:25am**

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

#### **Discipline Welcome**

**9:25 – 10:15am**

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

#### **ARM Litigation for Dummies**

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

[Matthew Kaufman](#), ASA, ARM | Principal | Spearhead Valuation Group

New to litigation? Let's break down the nuts and bolts to get you up and running.

**10:45 – 11:45am**

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

#### **Bankruptcy Valuation for Appraisers: The Process, the Pitfalls, and the Courtroom Reality**

[Robert Morrison](#), FASA, IA

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

This program will describe the role appraisers play in bankruptcy cases, the process with being engaged, the types of engagements, and the pitfalls associated with working in bankruptcy. It will also explore what the court looks for in appraisals using a case study as an aid.

1:15 – 2:05pm

[ARM/Multi-Discipline]

**IRS and 2026 Case Law Updates, Music-Related Valuations**

Robert Schlegel, FASA, ARM | 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.

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

Updated IRS related issues as of October 2026, including staffing conditions, agency priorities, valuation review and methodology, audit red flags, tax court decisions, and more. An additional topic will focus on music valuation issues, including copyright issues and personal property issues, both from an IRS tax perspective and from a public market buy/sell opportunity, useful for both Personal Property and Business Valuation.

2:10 – 3:00pm

[ARM/Multi-Discipline]

**Navigating Multidisciplinary Valuation Review**

[Dennis Webb](#), ASA | CEO | Primus Valuations

[Gazelle Wichner](#), ASA | Director Quality and Risk Management division | CBRE Valuation and Advisory Services

Multidisciplinary valuations are inherently complex and often poorly understood by those who are tasked with reviewing them. Unfortunately, since institutional risk never gets a pass. This presentation will reveal a path toward the reviewer's ultimate goal—a reliable and credible appraisal report—by a) navigating unsupported assertions (certain types of “judgment”), b) recognizing one's own blind spots and limitations, and 3) communicating all of this to the valuer in a clear and diplomatic manner. Take advantage of the seasoned presenters' long experience and expertise with multidisciplinary valuation to improve the power and quality of your reviews.

3:30 – 4:20pm

[ARM/Multi-Discipline]

**UAPs in Valuation**

[Christopher Olson](#), ASA | Vice President | GreatBanc Trust Company

[Heather Plumski](#) | President | Stearns Bank

Unearthing Appraisal Problems ("UAPs"). This presentation will address the whole spectrum of appraisals that land on our desks. We will discuss what we look for, what we want, what analysis we do internally within our firms, and the problem spots we zone in on within appraisals.

**Tuesday, October 6, 2026**

8:00 – 9:00am

**Keynote Address: The Leadership Quotient: Staying Relevant, Trusted, and Indispensable in a World of Change**

[Benjamin Smithee](#) | CEO | The Smithee Group

In today's rapidly evolving marketplace, technical expertise alone is no longer enough to stand out. In this dynamic keynote, Ben Smithee shares a practical leadership

framework to help valuation professionals strengthen credibility, communicate with clarity, and position themselves as trusted strategic partners. Attendees will gain actionable insights to navigate change, deepen client relationships, and remain indispensable in an increasingly competitive and AI-driven environment.

**9:05 – 9:55am**

**[ARM/Multi-Discipline]**

**AI in Valuation: Practical Strategies, Risks, and the Road Ahead**

[Greg Endicott](#), ASA | Managing Director | Strategic Value Group, LLC

[Kevin Couillard](#), ASA | Executive Director - Business Valuation & Litigation Support | Fair Value Advisors, LLC

Artificial intelligence is no longer theoretical in valuation, it is reshaping workflows, client expectations, and regulatory scrutiny. This session examines how AI tools, including generative models and agents, are being adopted in appraisal and valuation practice. It covers lessons from early adopters, emerging professional standards, and recent platform developments such as GPT-5, Copilot, and Gemini. Attendees will leave with practical guidance for using AI responsibly while preserving professional judgment, transparency, and ethics—directly supporting the 2026 theme, A New Frontier: Appraising in a World of Change.

**10:25 – 11:15am**

**[ARM/Multi-Discipline]**

**Report Writing Panel**

[Jo Crescent](#), ASA, ARM | Operations Manager & co-Owner | NorCal Valuation, Inc.

Garrett Schwartz, ASA, AMEA | Senior Equipment Appraiser | Sencer Appraisal Associates

Panel of experts discussing how to organize and review an appraisal report, perhaps focusing on scope of work elements & the CARRS elements.

**11:20am – 12:10pm**

**[ARM/Multi-Discipline]**

**Professional Judgment & Defensibility in Business Valuation**

[Karen Lascelle](#) | Principal | TSS Advisors, LLC

This session examines how professional judgment and defensibility shape business valuation conclusions beyond technical methodology. While standards provide a framework, valuation outcomes are driven by judgment calls related to assumptions, projections, method selection, and reconciliation. Attendees will explore what reviewers, regulators, and courts actually scrutinize, common causes of valuation challenges, and how documentation impacts credibility. An integrated case study will allow participants to apply judgment in a realistic scenario involving conflicting indications of value. The session emphasizes improving valuation quality through consistency, transparency, and defensible reasoning rather than increased complexity.

1:10 – 2:00pm

**[ARM/Multi-Discipline]**

**Counterproductive Litigation Reports**

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

[Brian Crotty](#), ASA | Managing Director | HDH Advisors

The complexity of valuation allows highly differing opinions making it difficult for the Trier of Fact (Judge or Commissioner) to decide an appropriate value conclusion. This presentation illustrates reports which fail to provide the author with sufficient grounds for testimony to support a value conclusion. Thus, illustrating the role of an Appraisal/Valuation Reviewer.

2:05 – 2:55pm

**[ARM/Multi-Discipline]**

Hot Topics in Complex Matrimonial Valuations

[Kenneth Pia](#), ASA | Lead Managing Director/Matrimonial Practice Leader | CBIZ

[Jay E. Fishman](#), FASA, FRICS | Managing Director - Valuation Advisory | Stout

Discussion of complex valuation in matrimonial cases which cause cases to go to trial. Understanding what drives the differences and how to defend or rebut various positions.

3:15 – 4:05pm

**[ARM/Multi-Discipline]**

**Where Appraisal Meets Reality: A Dealer-Appraiser's View**

Tyler Maassen, AM | ASA - AM | SIGMA Group

This presentation explores appraisal practice from the dual perspective of professionals who operate as both machinery and equipment appraisers and active used-equipment dealers. Drawing on real transactional experience, we will examine how dealer-side market volatility challenges the reliability of comparable data in 2026, strategies for managing client and end-user expectations, and common missteps appraisers make when developing opinions of Orderly Liquidation Value and Forced Liquidation Value. Attendees will gain practical insight into aligning valuation conclusions more closely with actual market behavior.

4:10 – 5:00pm

**[ARM/Multi-Discipline]**

**Appraisal Consulting – Trap or Opportunity?**

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

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

“Appraisal Consulting” is more often seen in our “world of change.” This session will review the key USPAP principles concerning appraisal consulting with examples of consulting assignments that constitute appraisal practice, but not the development of an opinion of value, as well as other duties that an appraiser may undertake that do not constitute appraisal practice. Examples of these forms of assignments will be discussed, along with the risks that “consulting” could be interpreted as an appraisal, and the issues that arise in moving from “consultant” to “appraiser” in client work.