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

Schedule

Personal Property

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

[Personal Property]
Discipline Welcome

9:25 – 10:15am

[Personal Property]
Today's Western and Texas Fine Art Market
Phil Berkebile, Jr. | Owner | Lone Star Art Auction
Katy Alexander, ISA AM | Consignment Director | Lone Star Art Auction

This session will explore the current state of the Western and Texas fine art markets, highlighting key trends, collector demand, and notable auction activity shaping today's landscape. Using real-world sales data and recent auction results, the discussion will examine market performance across historical, established, and contemporary artists while providing insight into valuation considerations, emerging trends, and factors influencing buyer behavior in this dynamic segment of the art market.

10:45 – 11:45am

[Personal Property]
Navigating Fine Art Insurance: Collaborating Between Appraisers, Collectors, and Insurers
Adrienne Reid, CIC | Senior Vice President | Huntington T. Block Insurance Agency, Inc.

This session explores the complexities of fine art insurance across a range of collections, from individual works to large, diverse holdings. Attendees will gain insight into common coverage gaps and risk pitfalls, along with practical strategies for effective collaboration between appraisers, collectors, and insurers. The discussion will highlight best practices to support informed decision-making and comprehensive collection management.

1:15 – 2:05pm

[Personal Property]
Appraisal Management Services-- the "M" in ARM
Melanie Modica, ASA, ARM | Modica Fine Arts

Appraisal management methodology assists appraisers and valuers with the skills needed to perform and offer assignment management services. Considering the caveats for hiring a team, along with various options available to appraisers, professionals will understand how to organize and oversee appraisers. Managers are able to offer clients teams consisting of appraisers in the same discipline and the same specialty, or the same discipline and different specialties, or different disciplines and different specialties. Considerations for levels of oversight and guidance will help managers prepare and operate in an efficient manner for successful outcomes. USPAP AO-31 will be shared and explained.

2:10 – 5:00pm

[Personal Property]
Off Site & Virtual Tour: Heritage Auctions

Step inside one of the industry's premier auction houses with an exclusive behind-the-scenes tour of Heritage Auctions' new Dallas facility. Personal Property and Gems & Jewelry attendees will experience firsthand how world-class collections are evaluated, handled, and brought to market. A simultaneous live virtual tour will offer online attendees a front-row look at the experience. Following the tour, Heritage representatives will lead a session for all attendees, sharing insights and expertise from the front lines of the auction world.

Session: Passion Assets: Luxury Accessories
Join us to explore the rising global demand for collectible handbags from iconic heritage fashion houses. Discover how these luxury accessories are evolving beyond style statements to become sought-after alternative assets, shaped by scarcity, brand prestige, and dynamic secondary markets. Whether you're a seasoned collector or just entering the space, we'll break down the key drivers of value, rarity, condition, provenance, and demand, and how they influence both personal collecting and long-term investment potential.

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

[Personal Property]
Introduction to Gift Tax and the Fair Market Value Rental Rate Appraisal
Charles Rosoff, ASA, MRICS | President | Appraisal Services Associates

Personal Property Appraisers are increasingly called upon to determine Fair Market Value Rental Rates as a strategy to help postpone and reduce taxable estates. This session explores the growing demand for these appraisals within the context of current estate and gift tax thresholds, exemptions, and annual exclusions. Attendees will gain a practical understanding of how tools such as IRS Publication 559 and Form 709 support these strategies. The discussion will focus on the appraiser's role in applying these concepts effectively in real-world estate planning scenarios.

10:25 – 11:15am

[Personal Property]
Appraising Furniture and Design: A Style Driven Market
Brent Lewis | Director, Business Development | Rago/Wright Auctions

Today's furniture and design market has undergone significant shifts in how underlying value is attained. Through shifting market forces such as the diminishing value of traditional antiques, and the broadening of the retail market of auctions, the secondary market has shifted from an expert class of dealers and collectors to a larger audience of enthusiasts, decorators and buyers who assign value differently, with a greater emphasis on style and trend. This presentation delves into these trends and provides context on these shifts, exploring today's relevant trends and styles using case studies and examples from auctions and comps used by appraisers.

11:20am – 12:10pm

[Personal Property]
Beyond the Bottle: Appraising Wine/Spirits in a Changing Global Landscape
Annie Edgerton, DWSET, CS, CSW, CSS | Owner, Principal Appraiser | Edgerton Wine and Spirits Appraisals

Wine and spirits are a perfect lens for understanding the future of personal property appraisal: globalized, fast-moving markets; authenticity challenges accelerated by technology; volatile consumer trends; and value driven as much by story and scarcity as by tangible characteristics. This session will illuminate broader shifts affecting all appraisers—from how we evaluate risk and provenance to how we document condition, bias, and uncertainty in a changing world. Attendees will leave with practical tools and a deeper view of how emerging asset classes can help shape more resilient, adaptable appraisal practice.

1:10 – 3:00pm

[Personal Property]
Authenticity Under Scrutiny: Detecting Deception in Works of Art
Hannah Ziesmann | Prints & Multiples Specialist | Heritage Auctions

This presentation focuses on practical strategies for identifying fakes and misattributed works. It highlights key warning signs in materials, craftsmanship, and documentation, supported by instructive examples. The goal is to strengthen both visual analysis and critical judgment in the appraisal process.

2:05 – 2:55pm

[Personal Property]
Appraising Estates: Tax Court Case Precedents
Sandra Tropper, FASA | Vice Chair PP education | Artemis, Inc.

The appraiser that completes appraisals for estate filings needs to be aware of precedent setting tax court cases. This presentation will review the decisions of several cases and their implications for future appraisal assignments.

3:15 – 5:00pm

[Personal Property]
In the Hot Seat: Expert Witness Prep in Action
Andrea Perez | Partner | Carrington Coleman
Joshua Wood, JD, MAI, AI-GRS | Partner | Teel Valuation Group

This highly interactive session prepares appraisers for the realities of serving as an expert witness, from designation through deposition. Through unscripted mock exercises and live participation, attendees will step into the process, experiencing firsthand how testimony unfolds and how attorneys challenge expert opinions. Walk away with practical insight, greater confidence, and a clearer understanding of what it takes to perform in the hot seat.