

2024 ASA Philadelphia Chapter | Business Valuation | Virtual Seminar | Sep. 19, 2024, Thursday

8:00-8:15am REGISTRATION & WELCOME

Steven Juska, ASA, Managing Director, CBIZ - Conference Co-Chair
Sean O'Reilly, ASA, Partner, CFGI - Conference Co-Chair

SESSION 1: 8:15-9:00am NATIONAL ECONOMIC UPDATE

Anna Rathbun, CFA, CAIA

Chief Investment Officer, CBIZ | Cleveland, OH | 216.525.7022 | arathbun@cbiz.com

SESSION 2: 9:00-9:45am DEVELOPING A CREDIBLE OPINION IN LITIGATION SETTING

Ryan J. White, CPA/ABV

Director, FRA, Philadelphia PA
484.270.1270 | rwhite@frainc.com

Patrick J. McElroy

Manager, FRA, Philadelphia PA
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SESSION 3: 9:45-10:30am ECONOMIC & FINANCIAL MARKET EVENTS IMPACTING COST OF CAPITAL

Carla Nunes, CFA

Managing Director, Kroll | Philadelphia, PA | 215.430.6149 | carla.nunes@kroll.com

10:30 am - 10:45 am COFFEE BREAK

SESSION 4: 10:45-11:30am OPTION PRICING MODELS TO QUANTIFY DLOM

Faisal Lakhani, CFA, ABV

Managing Director, CBIZ | Atlanta, GA | 404.455.8627 | faisal.lakhani@cbiz.com

SESSION 5: 11:30am-12:15pm CSRP FOR FINANCIAL REPORTING PURPOSES: UPDATE ON EVOLVING PRACTICE

Anthony Pumphrey, CFA, ASA

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Sean Woodward

Senior VP, VRC | Philadelphia, PA
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12:15-1:15pm LUNCH RECESS

SESSION 6: 1:15-2:00pm FUND ASSET PERFORMANCE; VALUATION OF PUBLIC ALTERNATIVE ASSET MANAGERS

Justin Kuczmariski, CPA/ABV, CVA

NAV Valuation & Advisory LLC | NY, NY
212.418.1234 | justin@navvaluation.com

Antonella Puca, CPA/ABV, CFA

Partner, BlueVal Group | NY, NY
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SESSION 7: 2:00-2:45pm HUMAN CAPITAL & WORKFORCE VALUATION

Dr. Solange Charas, Ph.D.

Professor, Columbia University | 646.275.2022 | scharas@hcmoneyball.com

2:45-3:00pm COFFEE BREAK

SESSION 8: 3:00-3:45pm BUSINESS VALUATION TOPICS

Ryan Haag

Senior Manager, CBIZ | Conshohocken, PA | 610.425.7199 | ryan.haag@cbiz.com

SESSION 9: 3:45-4:30pm ASC 805 TOPICS: DISTRIBUTOR METHOD, SYNTHETIC ROYALTY RATES

Raymond Armstead, ASA

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Conference Advisor: PJ Patel, ASA, CFA, Co-CEO & Senior Managing Director, VRC

Conference Organizer: Poonam Vaidya, CBIZ | 786.223.0963 (Text Only) | p vaidya09@gmail.com

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