Z. Christopher Mercer, FASA, CFA, ABAR

mercerc@mercercapital.com

PROFESSIONAL EXPERIENCE

Z. Christopher Mercer is the Chairman of Mercer Capital. Chris began his valuation career in the late 1970s. He has prepared, overseen, or contributed to hundreds of valuations for purposes related to tax, ESOPs, buy-sell agreements, and litigation, among others. In addition, he has served on the boards of directors of several private companies and one public company. He enjoys working with business owners to address ownership transition issues.

Chris has extensive experience in litigation engagements including statutory fair value cases, divorce, and numerous other matters where valuation issues are in question. He is also an expert in buy-sell agreement disputes.

Chris is a prolific author on valuation-related topics and a frequent speaker on business valuation issues for national professional associations and other business and professional groups.

Books authored by Chris include:

- *Buy-Sell Agreements: Valuation Handbook for Attorneys* (American Bar Association, *2024*)
- *Business Valuation: An Integrated Theory, Third Edition*, (John Wiley & Sons, Inc., 2020) with Travis W. Harms, CFA, CPA/ABV
- *Unlocking Private Company Wealth: Proven Strategies and Tools for Managing Wealth in Your Private Business* (Peabody Publishing, LP 2014)
- *Buy-Sell Agreements for Baby Boomer Business Owners*, *Kindle Edition* (Peabody Publishing, LP 2013)
- *Buy-Sell Agreements for Closely Held and Family Business Owners: How to Know Your Agreement Will Work Without Triggering It* (Peabody Publishing, LP, 2010)
- *Business Valuation: An Integrated Theory, Second Edition*, (John Wiley & Sons, Inc., 2008) with Travis W. Harms, CFA, CPA/ABV
- *Buy-Sell Agreements: Ticking Time Bombs or Reasonable Resolutions?* (Peabody Publishing, LP, 2007)
- *Valuing Shareholder Cash Flows: Quantifying Marketability Discounts* (Peabody Publishing, LP, 2005)
- *Valuing Enterprise and Shareholder Cash Flows: The Integrated Theory of Business Valuation* (Peabody Publishing, LP, 2004)
- *Quantifying Marketability Discounts* (Peabody Publishing, LP, 2001, & 1997)
- *Valuing Financial Institutions* (Business One Irwin, 1992)

PROFESSIONAL DESIGNATIONS

Accredited in Business Appraisal Review (The National Association of Certified Valuators and Analysts)

Accredited Senior Appraiser, Fellow (The American Society of Appraisers)

Chartered Financial Analyst (The CFA Institute)

PROFESSIONAL MEMBERSHIPS

International Valuation Standards Council

Member of the Professional Board (2011 to 2014)

American Society of Appraisers

College of Fellows (2016-present)

Chairman of the Standards Sub-Committee (2007 to 2011)

Vice-Chairman, International Board of Examiners (1991-1994)

Member of the Standards Sub-Committee (1990 to 2005)

Elected Member, Business Valuation Committee (1990-1996)

The CFA Institute (1984 to present)

National Speakers Association, Member (1998 to 2022)

Memphis Society of Financial Analysts (1984 to present)

The Value Examiner, Editorial Advisory Board (2009 to present)

Financial Valuation and Litigation Expert, Editorial Advisory Board (2008 to present)

Valuation Strategies, Editorial Advisory Board (1998 to 2008)

Business Valuation Review

Contributing Columnist (2002 to 2010)

Editorial Review Board (1995 to 2002)

FACULTY POSITIONS HELD

Mid-South School of Banking, 1981

Memphis State University, Part-Time Lecturer, 1976

University of Maryland, European Division, Part-Time Lecturer, 1973-1975

DIRECTORSHIPS

Travel Nurses, Inc., Chair of Executive Committee (2016 - Present)

Mercer Capital Board of Directors, Chairman (1982 – Present)

International Children's Heart Foundation, Memphis, Tennessee (2005-2010)

Klumb Lumber Company, Point Clear, Alabama (2005-2008)

Christian Brothers University - School of Business, Advisory Board, Memphis, Tennessee (2002-2003)

Youth Service, USA of Memphis, Inc., Memphis, Tennessee, (1990-1994)

Memphis Alliance for Progress (Treasurer), (1985-1986)

Market Data Systems, Inc., Memphis, Tennessee, (1983-1985)

Mid Continent Systems, Inc., West Memphis, Arkansas, (1983-1984)

Respiratory Care Services, Inc., Jackson, Mississippi, (1982-1984)

Grace St. Luke's Episcopal Church, Memphis, Tennessee

Memphis Choral Arts, Board Member Emeritus (2010 – Present)

EMPLOYMENT

Mercer Capital Management, Inc.

Chairman, 2021 to present

Chief Executive Officer, 1982 to 2020

Morgan Keegan & Company, Inc.

First Vice President, 1978 to 1982

Peat Marwick Mitchell & Co.

Bank Consultant, 1978

First Tennessee National Corporation

Assistant Treasurer, 1975 to 1978

U.S. Army

1971 to 1974 (honorably discharged at rank of Captain)

EDUCATION

Vanderbilt University, Nashville, Tennessee (M.A., 1971)
Stetson University, Deland, Florida, (B.A., *cum laude* 1968)

PUBLISHED BOOKS

Contributing Author, SHANNON PRATT'S THE LAWYER'S BUSINESS VALUATION HANDBOOK: UNDERSTANDING FINANCIAL STATEMENTS, APPRAISAL REPORTS, AND EXPERT TESTIMONY, THIRD EDITION, Shannon P. Pratt, (ABA Book Publishing), 2024

Author, BUY-SELL AGREEMENTS: VALUATION HANDBOOK FOR ATTORNEYS, (American Bar Association), *2024*

Co-Author, BUSINESS VALUATION: *An Integrated Theory, Third Edition*, (John Wiley & Sons, Inc.), with Travis W. Harms, CFA, CPA/ABV, 2021

Author, UNLOCKING PRIVATE COMPANY WEALTH: *Proven Strategies and Tools for Managing Wealth in Your Private Business,* (Peabody Publishing, LP), 2014

Author, BUY-SELL AGREEMENTS FOR BABY BOOMER BUSINESS OWNERS: *Kindle Edition,* (Peabody Publishing, LP), 2013

Author, BUY-SELL AGREEMENTS FOR CLOSELY HELD AND FAMILY BUSINESS OWNERS: *How to Know Your Agreement Will Work Without Triggering It,* (Peabody Publishing, LP), 2010

Contributing Author, AN ESTATE PLANNER'S GUIDE TO REVENUE RULING 59-60: *Understand How Valuation Experts Utilize the Ruling in Income and Estate & Gift Tax Valuation Engagements*, (Peabody Publishing, LP), 2010

Contributing Author, REVENUE RULING 59-60 AT 50: *Rediscover Fair Market Value*, (Peabody Publishing, LP), 2009

Co-Author, BUSINESS VALUATION: *An Integrated Theory, Second Edition*, (John Wiley & Sons, Inc.), with Travis W. Harms, CFA, CPA/ABV, 2008

Author, BUY-SELL AGREEMENTS: *Ticking Time Bombs or Reasonable Resolutions?*, (Peabody Publishing, LP), 2007

Author, VALUING SHAREHOLDER CASH FLOWS*: Quantifying Marketability Discounts*, (E-Book format: Peabody Publishing, LP), 2005

Author, VALUING ENTERPRISE AND SHAREHOLDER CASH FLOWS: *The Integrated Theory of Business Valuation*, (Peabody Publishing, LP), 2004

Author, QUANTIFYING MARKETABILITY DISCOUNTS: *Developing and Supporting Marketability Discounts in the Appraisal of Closely Held Business Interests, Revised Reprint*, (Peabody Publishing, LP), 2001

Contributing Author, VALUATION FOR IMPAIRMENT TESTING: *The Finance and Accounting Professional's Guide to Valuing Reporting Units for Compliance with SFAS 142*, (Peabody Publishing, LP), 2001

Author, QUANTIFYING MARKETABILITY DISCOUNTS: *Developing and Supporting Marketability Discounts in the Appraisal of Closely Held Business Interests,* (Peabody Publishing, LP), 1997

Author, BANKING REVIEW 1993*: Stock Prices Headed for a Fall?,* (Mercer Capital), 1993

Author, VALUING FINANCIAL INSTITUTIONS, (Business One Irwin), 1992

PUBLISHED CHAPTERS

Valuation Provisions in Buy-Sell Agreements," *VALUING A BUSINESS, 6th EDITION: THE ANALYSIS AND APPRAISAL OF CLOSELY HELD COMPANIES*, (McGraw Hill), Shannon P. Pratt, ASA Educational Foundation, 2022

"Appendix D: Developing Cost of Capital" (Capitalization Rates and Discount Rates) Using ValueSource PRO Software," *COST OF CAPITAL SECOND EDITION,* (John Wiley & Sons, Inc.), Shannon P. Pratt, 2002

"Appendix D: The Quantitative Marketability Discount Model," *THE MARKET APPROACH TO VALUING BUSINESSES*, (John Wiley & Sons, Inc.), Shannon P. Pratt, 2001

"Appendix D: Developing Cost of Capital (Capitalization Rates & Discount Rates) Using ValuSource PRO Software," *COST OF CAPITAL*, (Wiley & Sons, Inc.), Shannon P. Pratt, 1998

"Valuation Issues in Business Planning," Chapter 17, *BUSINESS SUCCESSION PLANNING*, (University of Kentucky Continuing Legal Education), edited by Scott W. Dolson, F. Gerald Greenwell and Debbie F. Reiss, 1998

"Selling Partial Ownership Interests: Levels of Value," with J. Michael Julius, Chapter 12, *MERGERS AND ACQUISITIONS HANDBOOK FOR SMALL AND MIDSIZE COMPANIES*, (John Wiley & Sons, Inc.), edited by Thomas L. West and Jeffrey D. Jones, 1997

"Asset Liability Management Today," with Kenneth W. Patton, Chapter in *BANK PERFORMANCE ANNUAL*, (Warren, Gorham and Lamont), edited by Edwin B. Cox, 1987

"Capital Planning and Capital Adequacy," with Ronald Terry, Chapter 36, *THE BANKER'S HAND-BOOK*, (Dow Jones-Irwin), edited by William H. Baughn and Charles E. Walker, 1978

PUBLISHED ARTICLES

"Déjà Vu: Revisiting the Restricted Stock and Pre-IPO Studies (Part V of V)," *The Value Examiner,* March/April 2025

"Déjà Vu: Revisiting the Restricted Stock and Pre-IPO Studies (Part IV of V)," *The Value Examiner,* January/February 2025

"6 Ways to Evaluate Business Value," Mercer Capital's *Family Law Valuation and Forensic Insights*, January 2025

"Déjà Vu: Revisiting the Restricted Stock and Pre-IPO Studies (Part III of V)," *The Value Examiner,* November/December 2024

"Déjà Vu: Revisiting the Restricted Stock and Pre-IPO Studies (Part II of V)," *The Value Examiner,* September/October 2024

"Déjà Vu: Revisiting the Restricted Stock and Pre-IPO Studies (Part I of V)," *The Value Examiner,* July/August 2024

"Supreme Court Upholds *Connelly*," *Value Matters™,* Issue No. 2, 2024

"Fair Market Value and the Nonexistent Marketability Discount for Controlling Interests," Mercer Capital's *Family Law Valuation and Forensic Insights*, May 2023

"Quantifying Expected Holding Period Premiums from Restricted Stock Transactions," *Value Matters™,* Issue No. 2, 2021

"Restricted Stock Discounts: The Expected Holding Period Premium Is the Cause," *Value Matters™,* Issue No. 1, 2021

"Indiana Court of Appeals: No Discounts in Unclear and Mandatory Shareholder Agreement Buyout," *Value Matters™,* Issue No. 3, 2020

"How Can You Use Bank Valuation Concepts to Influence How You Think and Lead?" *Extraordinary Banker,* Issue No. 28, November 2019

"Valuation Assumptions Influence Valuation Conclusions," with Scott A. Womack, ASA, MAFF, Mercer Capital's *Tennessee Family Law Newsletter*, Second Quarter 2019

"*Kress v. U.S.* Denies S Corporation Premium and Accepts Tax-Affecting," *Value Matters™,* May 2019

"The Level of Value: Why Estate Planners Need to Understand This Critical Valuation Element of a Buy Sell Agreement," *Estate Planning Newsletter,* February 2019, published by the Society of Financial Service Professionals

"Six Different Ways to Look at a Dealership," with Scott A. Womack, ASA, MAFF, Mercer Capital's *Value Focus: Auto Dealer Industry Newsletter*, Mid-Year 2018

"Valuation Implications of the Tax Cuts and Jobs Act of 2017: Focus on Privately Owned C Corporations," *Value Matters™,* September 2018

"Six Ways to Look at a Business," with Scott A. Womack, ASA, MAFF, *Value Matters™,* September 2018

"Tennessee Supreme Court Addresses Statutory Fair Value for the First Time in 35 Years in *Athlon Sports Communications*," Mercer Capital's *Tennessee Family Law Newsletter*, Second Quarter 2018

"Characteristics of a Good Buy-Sell Agreement," *Business & Compensation Planning,* April 2018, published by the Society of Financial Service Professionals

"EBITDA Single-Period Income Capitalization for Business Valuation," *Business Valuation Review*, Volume 35, Issue 3, Fall 2016

"Valuation Implications of the Proposed Changes to Section 2704," *Financial Valuation and Litigation Expert*, Issue 63, October/November 2016

"Forewarning on Proprietary Deals," *Divestopedia*, September 28, 2015

"Seven Questions for Highly Effective Business Transitions," *Divestopedia*, September 21, 2015

"Managing Private Company Wealth is a Big Deal," *Value Matters™,* January 2015

"An Introduction to Dividends and Dividend Policy for Private Companies," *Financial Valuation and Litigation Expert*, Issue 52, December 2014/January 2015

"The Level of Value: Why Estate Planners Need to Understand This Critical Valuation Element of a Buy-Sell Agreement," with Nicholas J. Heinz, ASA, *Value Matters™,* January/February 2013

"Is the Promissory Note in Your Buy-Sell Agreement Fair to All Parties?" *Value Matters™,* Vol. 2012-01, February 2012

"$11 Million or $178 Thousand? New Jersey Appellate Court Upholds Book Value in Buy-Sell Agreement," *Value Matters™,* Vol. 2011-06, December 2011

"New York Statutory Fair Value: *Matter of Giaimo*," *Value Matters™,* Vol. 2011-04, August 2011

"Buy-Sell Agreements: Business Owners Benefit from Planning Ahead," *The CPA Journal,* June 2011

"Five Not-So-Customary Litigation Support Services," *The Value Examiner,* November/December 2010

"Business Value Before and After a Recession," *Value Added™,* Vol.21, No. 3, 2009

"Don't Rely Upon Templates When Constructing Buy-Sell Agreements," *Southeastern Wealth Management*, March 2009

"Top Ten Ways Business Owners Should Treat Their Business as the Investment That It Is," *Southeastern Wealth Management*, October 2008

"Treatment of Life Insurance Proceeds in Valuation," *Southeastern Wealth Management*, August 2008

"S Corporation Model Comparisons," with Travis W. Harms, CFA, CPA/ABV, *Business Valuation Review,* Vol. 27, No. 1, 2008

"Your Client's Buy-Sell Agreement – Ticking Time Bomb or Reasonable Resolution? Part Two," *Southeastern Wealth Management*, June 2008

"Your Client's Buy-Sell Agreement – Ticking Time Bomb or Reasonable Resolution? Part One," *Southeastern Wealth Management*, April 2008

"The One Percent Solution," *Southeastern Wealth Management*, February 2008

"Buy-Sell Agreements Can Create Pitfalls If Not Managed Properly," *Memphis Business Journal*, Vol. 29, No. 1, April 27-May 3, 2007

"Life Insurance Proceeds in Valuation for Buy-Sell Agreements," *Financial Valuation and Litigation Expert*, Issue 3, October/November 2006

"2006 USPAP Focuses on Credibility, SR-9 Holding Period Requirement and More," with Laura D. Stanford, *Business Valuation Update*, Vol. 12, No. 7, July 2006

"Consider Subsequent Events," with Michael J. Mard and LuAnne Turner, *The Value Examiner*, May/June 2006

"Embedded Capital Gains, One More Time: *Estate of Jelke*," *Valuation Strategies*, November/December 2005

"Buy-Sell Agreements from a Business Appraiser's Perspective," *Business Valuation Review*, Fall 2005

"When is Fair Market Value Determined?: *Estate of Noble*," *Valuation Strategies*, May/June 2005

"An Interview with Z. Christopher Mercer," *CCH Business Valuation Alert*, Vol. 6, Issue No.3, April 2005

"Competing Marketability Discount Methodologies," with Travis W. Harms, CPA/ABV, CFA, *The Value Examiner*, November/December 2004

"Are S Corporations Worth More than C Corporations?" *Business Valuation Review*, September 2004

"News & Views, The Importance of Disclosing Implied Rates of Return," *ASA BV E-Letter*, Issue 8-39, September 29, 2004

"An In-Depth Review of the Quantitative Marketability Discount Model and Competing Marketability Methodologies," with Travis W. Harms, CPA/ABV, CFA. *The Value Examiner*, September/October 2004

"The Integrated Theory of Business Value," *Valuation Strategies*, May/June 2004

"Not So Random Thoughts on the Business of Business Valuation," *ASA BV E-Letter*, Issue 8-15, April 14, 2004

"County's Independent Banks Face Challenges, Opportunities," *Memphis Business Journal*, February 6-12, 2004

"Competitors: Rivals or Resources?" *Professional Speaker*, January/February 2004

"Ibbotson Associates' Valuation Report Certification Services 'Not Approved'," *Business Valuation Update*, Vol. 9, No. 8, August 2003

"An Integrated Theory of Business Valuation," *The Journal of Business Valuation*, August 2003, published by the Canadian Institute of Chartered Business

"Panel Discussion on the Issues of Valuation for SFAS 142," with James R. Hitchner and Michael J. Mard, *The Journal of Business Valuation*, August 2003

"A Primer on the Quantitative Marketability Discount Model," *The CPA Journal*, July 2003

"Mercer Matters," *Business Valuation Review*, December 2002

"QMDM: QED," *Valuation Strategies*, July/August 2002

"S Corporation Valuation in Perspective: A Response to the Article 'S Corporation Discount Rate Adjustment,'" with Travis W. Harms, CFA, CPA/ABV, *AICPA ABV E-Valuation Alert*, Vol. 4, Issue 7, July 2, 2002

"S Corporation vs. C Corporation Values," *Business Valuation Update,* June 2002

"Goodwill Valuation Under SFAS 142," with Matthew R. Crow, ASA, CFA and Kenneth W. Patton, ASA, *The CPA Journal*, February 2002

"Marketability Discount Analysis at a Fork in the Road," with Travis W. Harms, CFA, CPA/ABV, *Business Valuation Review*, December 2001

"Marketability Discounts: Back to Reality," with Nicholas J. Heinz, ASA, *Valuation Strategies*, November/ December 2001

"Ten Mistakes by Acquirers," *M&A Today*, Special Issue 2001

"Quantitative, Rate of Return Analysis vs. Benchmark Analysis in Developing Marketability Discounts," *Valuation Strategies*, March/April 2001

"Discounts on Real Estate Partnership Interest – IRS Loses on Minority Interest, Wins on Lack of Marketability," *The Journal of Real Estate Taxation*, Fall 2000

"It's Not About Marketability, It's About Minority Interest," *Valuation Strategies*, July/August 2000

"The Quantitative Marketability Discount Model Revisited," *Valuation Strategies*, March/April 2000

"On Advocacy and the Expert Witness: Attorney Challenge Case Studies," *CPA Litigation Services Counselor*, January/February 2000

"On Advocacy and the Expert Witness – Part 1: Attorney Challenge Case Studies," *CPA Litigation Services Counselor*, January 2000

"The Grapes of Value: Organizing Principles of Business Valuation," *Valuation Strategies*, November/December 1999

"Are Business Valuation Standards Being Invoked By The Tax Court?" *Valuation Strategies*, July/August 1999

"Fair Market Value vs. the Real World," with Terry S. Brown, *Valuation Strategies*, March/April, 1999

"Embedded Capital Gains in C Corporation Holding Companies," *Valuation Strategies*, November/December 1998

"Black-Scholes vs. The Quantitative Marketability Discount Model," with Matthew R. Crow, ASA, CFA, *Valuation Strategies*, September/October 1998

"Understanding and Quantifying Control Premiums: The Value of Control vs. Synergies or Strategic Advantages," *The Journal of Business Valuation*, September 1998, published by the Chartered Institute of Business Valuators

"Writing for the *Business Valuation Review*," *Business Valuation Review*, June 1998

"Quantifying Marketability Discounts: New or Not?" *Trusts & Estates,* February 1998

"Are Marketability Discounts Applicable to Controlling Interests in Private Companies?" *Valuation Strategies,* November/December 1997

"A Brief Review of Control Premiums and Minority Interest Discounts," *The Journal of Business Valuation*, November 1996, published by the Chartered Institute of Business Valuators

"Some Thoughts Regarding the Business of Business Appraisal," *CPA Expert,* Winter/1995

"Quantitative Marketability Discount Methodology," *The Journal of Business Valuation*, November 1994, published by the Chartered Institute of Business Valuators

"Should Marketability Discounts Be Applied to Controlling Interests of Private Companies?" *Business Valuation Review*, June 1994

"Using Valuation Knowledge to Your Advantage," *ABC Today*, March 1994

"What is Your Business Worth?" *ABC Today*, March 1994

"Multiple Magic: Understand Where Acquisition Multiples Come From and How to Maximize Shareholder Value," *M & A Today, Vol. 2, No. 4,* July/August 1993

"Investors in Bank Stocks, Beware: The Industry is Weaker Than It Looks," *American Banker*, June 3, 1993

"Bank Analysis: A Long View of Banks' Performance Gives Clues to Future Results," *Bank Account and Finance*, Summer, 1993

"IRS Ruling Encourages Giving the Gift of Shares," *Memphis Business Journal*, May 24-28, 1993

"All the Wrong Reasons for Not Obtaining an Independent Appraisal," *Tennessee Small Business Review,* February/March 1993

"Adjusted Capitalization Rates for the Differences Between Net Income and Net Free Cash Flow," *Business Valuation Review*, December 1992

"Bankers Must Keep Swinging the Layoff Ax," *American Banker*, May 12, 1992

"The Case for Estate Tax Appraisals by Appraisals Professionals," *Business Valuation Review*, March 1992

"Do Public Company (Minority) Transactions Yield Controlling Interest or Minority Interest Pricing Data?" *Business Valuation Review*, December 1990

"The Adjusted Capital Asset Pricing Model for Developing Capitalization Rates: An Extension of Previous 'Build-Up' Methodologies Based Upon the Capital Asset Pricing Model," *Business Valuation Review*, December 1989

"Issues in Recurring Valuations: Methodological Comparisons from Year-to-Year," *Business Valuation Review*, December 1988

"The Need for Bank Stock Valuations," Vol. 1-4, *Virginia Bankers Association Banking News No. 8,* November/October/September/August 1988

"Not So Random Thoughts Regarding The Business of Business Appraisal," *Business Valuation Review,* June 1988

"The Perils of Excess," with David A. Harris, *ABA Banking Journal*, October 1987

"How to Buy or Sell a Branch," with Kenneth W. Patton, *The Southern Banker*, October 1985

"Business Valuation can Serve in Lifetime Planning," with Douglas K. Southard, *Memphis Business Journal*, April 1-5, 1985

"Valuation Process Holds Keys to Executive Wealth," with Douglas K. Southard, *Memphis Business Journal*, March 25-29, 1985

"Building Fee Income," with Kenneth W. Patton, ASA, *The Southern Banker*, December 1984

"What IRA's are Worth," with Douglas K. Southard, *The Southern Banker*, June 1984

"If Deposit Intangibles Exist, Can Uniform Accounting Treatment Be Far Behind?" *ABA Banking Journal*, August 1983

"Managing a Fluid Cash Flow is Essential for a Business' Lifeblood," *Memphis Business Journal*, March 7-11, 1983

"Outside Director's Viewpoint can be Helpful to a Closely-Held Company," *Memphis Business Journal*, January 31-February 4, 1983

"Rethinking Bank Capital," *The Southern Banker*, January 1983

SPEAKING ENGAGEMENTS

December 17, 2025
Once More unto the Breach: A Deep Dive into *Connelly v. United States*
Webinar sponsored by NACVA

December 4, 2025
Current State of the Valuation Profession
NACVA: The Analyst's Edge 2025 Virtual Summit: Future Proofing Business Valuation and Financial Litigation Services

November 18, 2025
The Current State and Future of the Business Appraisal Profession
FICPA Valuation Conference Miami Beach, FL

October 21, 2025
Connelly v. United States and a Brief Overview of Current Issues in the Gift and Estate Tax World,
2025 ASA International Conference, San Juan, Puerto Rico

October 8, 2025
Déjà vu: Revisiting the Restricted Stocks and Pre-IPO Studies
Webinar sponsored by NACVA

September 11, 2025
The Current State of the Business Valuation Profession
2025 NACVA Business Valuation and Financial Litigation Super Conference, Salt Lake City, Utah

June 17, 2025
The Future of the Valuation Profession
Webinar sponsored by AICPA

April 8, 2025
"Maximizing Shareholder Value: Reinvestment vs. Distribution" with Chris Mercer
lumiQ, Podcast

February 24, 2025
The Future of the Business Valuation Profession
Webinar sponsored by NACVA

December 12, 2024
Understanding the Quantitative Marketability Discount Model, with Steve Brunner, CPA, CVA, MAFF, CMAA
2024 NACVA Business Valuation and Financial Litigation Super Conference, Las Vegas, Nevada

October 17, 2024
Adapting Buy-Sell Agreements: International Perspectives
BVIUK 4th Virtual Expert Summit, Webinar

October 9, 2024
SCOTUS vs. Connelly
American Bar Association, Webinar

May 17, 2024
Business, Bucks, and Breakups
2024 AAML National Family Law Conference, Nashville, Tennessee

May 3, 2024
A Look at the Future of the Business Valuation and Financial Forensics Profession
MACPA 2024 Forensic Valuation Regional Conference, Linthicum Heights, Maryland

March 21, 2024
89. "Know Us, Like Us, Trust Us" with Chris Mercer
Driven By with Sam Coates, Podcast

January 24, 2024
Redefining Valuation: Exploring the Integrated Theory
Business Valuation Institute UK, Webinar

January 9, 2024
An Examination of the Major Valuation Discounts and Premiums
FICPA Valuation, Forensic Accounting, and Litigation Services Conference, Fort Lauderdale, Florida

December 14, 2023
Almost Everything You Ever Wanted to Know About Professional Development (With Lots of How To-Dos)
NACVA/CTI Business Valuation and Financial Litigation Super Conference, Fort Lauderdale, Florida

November 1, 2023
Business Divorce Litigation: The Good, the Bad, and the Ugly
New York Commercial Division Institute, New York, New York

October 26, 2023
Expert Panel
Business Valuation Institute UK, Webinar

October 10, 2023
How Growing Professionals Can Become Thought Leaders Through Publishing
American Society of Appraisers, Webinar

July 15, 2023
Current State of the Valuation Profession
2023 NACVA Business Valuation & Financial Litigation Super Conference, Salt Lake City, Utah

May 15, 2023
Statutory Fair Value in New York: Is the Marketability Discount Applicable?
2023 NYSSCPA Annual Business Valuation & Litigation Services Conference, New York, New York

May 11, 2023
Expert Panel
Business Valuation Institute UK, Webinar

May 5, 2023
The Art and Science of Business Valuations—Grey Zones to Consider
Florida Chapter's AAML 45th Annual Institute, Orlando, Florida

December 19, 2022
Déjà Vu All Over Again: Some Things We Should Have Gotten Decades Ago
NACVA Around the Valuation World International (Webinar)

December 16, 2022
Valuation Potpourri: Things You Can Do with the Integrated Theory of Business Valuation
2022 NACVA Business Valuation & Financial Litigation Super Conference, Ft. Lauderdale, Florida

November 15, 2022
Valuation Hot Topics: Panel Discussion with Lisa Cribben, CPA/ABV, ASA, CMA, Stacy Collins CPA, ABV, CFF, and James Hitchner, CPA/ABV/CFF, ASA
2022 AICPA & CIMA Forensic & Valuation Services Conference, Las Vegas, Nevada

October 25, 2022
Valuation Provisions in Buy-Sell Agreements with Jeffrey Tarbell, ASA, CFA
Webinar sponsored by the American Society of Appraisers

September 28, 2022
The State of the Business Valuation Profession
Louisiana State Chapter of NACVA – State Chapter Meeting Virtual Presentation

September 13, 2022
An Integrated Theory of Major Valuation Issues
2022 Business Valuation Conference Sponsored by the Chartered Accountants of Australia and New Zealand (Virtual)

September 11, 2022
What It Takes To Be a Growing Professional with Jay Fishman, FASA
2022 ASA International Conference, Tampa, Florida

August 19, 2022
The State of the Business Valuation Profession
2022 NACVA Business Valuation & Financial Litigation Super Conference, Salt Lake City, Utah

March 1, 2022
Ask the Experts with Jim Hitchner, CPA/ABV/CFF, ASA and Michelle Gallagher CPA/ABV/CFF
Valuation Product and Services (VPS) StraightTalk (Webinar)

January 24, 2022
The Future of the Business Valuation Profession - Part I: Consolidation in Valuation and Related Spaces
NACVA Around the Valuation World (Webinar)

December 16, 2021
Restricted Stock Studies and Restricted Stock Discounts: Everything You Wanted to Know About Restricted Stock Transactions and More
2021 NACVA Business Valuation & Financial Litigation Super Conference, Ft. Lauderdale, Florida

December 9, 2021
Restricted Stock Studies and Restricted Stock Discounts: Everything You Wanted to Know About Restricted Stock Transactions and More
Business Valuation Resources Power Panel Webinar: Festivus Edition

November 15, 2021
Restricted Stock Studies
NACVA Around the Valuation World (Webinar)

November 10, 2021
Marketability Discounts: Current Trends and Techniques with Travis W. Harms, CFA, CPA/ABV
2021 AICPA & CIMA Forensic & Valuation Services Conference, Las Vegas, Nevada

November 9, 2021
Tricky Valuation Issues: Panel Discussion with Harold Martin, CPA/ABV/CFF, ASA, CFE, Stacy Collins CPA, ABV, CFF, and James Hitchner, CPA/ABV/CFF, ASA
2021 AICPA & CIMA Forensic & Valuation Services Conference, Las Vegas, Nevada

November 1, 2021
Hot Topics in Valuation: Panel Discussion
Minnesota Society of CPAs 2021 Business Valuation Conference (Virtual)

September 9, 2021
Valuing Single Asset Holding Companies
IRS Summit (Virtual)

July 29, 2021
An Overview of the Integrated Theory of Business Valuation
Georgia Society of CPAs Virtual Estate Planning Conference

June 28, 2021
Future of the Business Valuation Profession
NACVA Around the World Webcast

June 25, 2021
The Future of the BV Profession: A Look from the Inside Out
2021 NACVA Business Valuation & Financial Litigation Hybrid & Virtual Super Conference, Park City, Utah

May 4, 2021
Ask the Experts with James Hitchner, CPA/ABV/CFF, ASA and Jay Fishman, FASA
Webinar Sponsored by the Financial Consulting Group

April 21, 2021
Shareholder Cash Flows with Travis W. Harms, CFA, CPA/ABV
(Integrated Theory, Third Edition: Part 3 of a 3 Part Webinar)
Webinar Sponsored by Business Valuation Resources

April 5, 2021
Business Valuation Potpourri
Connecticut Chapter of the AAML, Virtual

March 17, 2021
Valuing Enterprise Cashflows with Travis W. Harms, CFA, CPA/ABV
(Integrated Theory, Third Edition: Part 2 of a 3 Part Webinar)
Webinar Sponsored by Business Valuation Resources

February 25, 2021
Three Short Vignettes: Changing the Way You Think About Business Value
Twelve Mavens Ask Anything Event, Virtual

February 17, 2021
Conceptual Overview of the Integrated Theory with Travis W. Harms, CFA, CPA/ABV
(Integrated Theory, Third Edition: Part 1 of a 3 Part Webinar)
Webinar Sponsored by Business Valuation Resources

November 16, 2020
Business Valuation: An Integrated Theory, Third Edition
NACVA Around the Valuation World Webcast

November 10, 2020
Valuing S Corps and Other Flow-Through Entities Post TCJA: Considerations for S Corporation Valuation
2020 AICPA Forensic & Valuation Services Conference, Virtual

November 9, 2020
Advanced Estate Planning Techniques and Related Valuation Considerations
2020 AICPA Forensic & Valuation Services Conference, Virtual

October 29, 2020
Communicating Complex Financial Topics
Louisiana Society of CPA's Forensic, Litigation and Valuation Services Conference, Virtual

October 27, 2020
Vision 2020: The Future of Our Profession and Your Role In It (Part I and II)
2020 Allinial Global Summit Conference, Virtual

October 21, 2020
You'll Never Think About Restricted Stock Discounts the Same Way Again…
Webinar Sponsored by the Financial Consulting Group

August 7, 2020
Vision 2020: The Future of Our Profession and Your Role In It
Business Valuation and Financial Litigation Virtual Super Conference Sponsored by NACVA

June 30, 2020
Standing Tall for Small Businesses: Planning in the Era of COVID-19
Webinar Sponsored by The American College of Financial Services

June 23, 2020
Valuable Conversations Attorneys and Business Appraisers Must Have ("We Need to Talk")
Webinar Sponsored by Leimberg Information Services

June 19, 2020
Vision 2020: The Future of Our Profession and Your Role In It
Business Valuation and Financial Litigation Virtual Super Conference Sponsored by NACVA

May 18, 2020
The Highs and Lows of the Integrated Theory of Business Valuation
Business Valuation/Litigation Services Conference Webcast Sponsored by NYSSCPA

May 7, 2020
Coronavirus Alert: Is Your Buy-Sell Agreement Defective?
Webinar Sponsored by Lerman Law Partners, LLP, Virtual

April 14, 2020
Understanding Private Company Valuation as a Concept for Building Wealth
Business Concern Podcast Sponsored by Business Transition Consulting

November 18, 2019
Communicating Complex Financial Topics
2019 PICPA Valuation & Forensic Accounting Conference, King of Prussia, Pennsylvania

November 18, 2019
Everything You Need to Know About Buy-Sell Agreements to Work with Attorneys and Referral Sources
2019 PICPA Valuation & Forensic Accounting Conference, King of Prussia, Pennsylvania

November 6, 2019
DLOM - Back to the Basics
2019 AICPA Forensic & Valuation Services Conference, Las Vegas, Nevada

November 4, 2019
Communicating Complex Financial Topics
2019 AICPA Forensic & Valuation Services Conference, Las Vegas, Nevada

October 16, 2019
The Value in Discounting Discounts --- Partial Interest Valuations and Discounts
IRS Valuation Summit, Washington D.C.

September 27, 2019
Valuation Perspectives for Private Business Owners: Focus on Unlocking Private Company Wealth and Buy-Sell Agreement
NAVIX Compass Meeting, Atlanta, Georgia

August 26, 2019
Best Ways to Create a Strong Referral Network
2019 ASA Advanced Business Valuation Conference, New York, New York

July 12, 2019
Testimonials from the INSIDER webinar with Chris Mercer
Practice Development Insider Webinar Sponsored by Rod Burkert

May 15, 2019
Everything You Need to Know About Buy-Sell Agreements
NACVA Minnesota Chapter 19th Annual Business Conference, Plymouth, Minnesota

May 15, 2019
Valuations, Premiums, and Discounts Demystified: The Integrated Theory of Business Valuation
NACVA Minnesota Chapter 19th Annual Business Conference, Plymouth, Minnesota

May 9, 2019
How to Present Complex Finance to Judges: K.I.S.S.
AAML/BVR 2019 National Divorce Conference, Las Vegas, Nevada

April 26, 2019
U.S. Valuation Issues with a Global Reach
Mazars Group 2019 Global Valuation Meeting, Marrakech, Morocco

April 10, 2019
Confessions of Two Reluctant Expert Witnesses and a Few Lessons Learned Over the Years
VPS Webinar

November 7, 2018
Valuation Tax Panel
2018 AICPA Forensic & Valuation Services Conference, Atlanta, Georgia

November 5, 2018
Active Passive Appreciation – Current Update
2018 AICPA Forensic & Valuation Services Conference, Atlanta, Georgia

October 26, 2018
Intrinsic Value and Valuation Multiples
2018 Fairfax Bar Association Annual Convention, Nashville, Tennessee

October 19, 2018
An Overview of Three Vexing Valuation Issues
Family Law Section of the Florida Bar Out-of-State Retreat, Nashville, Tennessee

October 10, 2018
EBITDA Single Period Income Capitalization for Business Valuation
2018 Advanced Business Valuation and International Appraisers Conference, Anaheim, California

October 9, 2018
Active Passive Appreciation – Current Update
2018 Advanced Business Valuation and International Appraisers Conference, Anaheim, California

September 12, 2018
"Succession" and "Transition" Planning – More Than Notebooks on Your Shelf
Institute for Extraordinary Banking Annual Conference, Minneapolis, Minnesota

July 30, 2018
What Estate Planners Should Know on Buy-Sell Agreements and Valuations
Tax Planning for High Net Worth Clients Symposium, Chicago, Illinois

June 28, 2018
EBITDA Single-Period Income Capitalization for Business Valuation
Webinar, Business Valuation Resources

June 21, 2018
Our Profession Is In Transition – Opportunities & Strategies for Baby Boomers, Gen Xers, and Millennials
NACVA and the CTI's 2018 Annual Consultants' Conference, Las Vegas, Nevada

May 2, 2018
Buy-Sell Agreements for Closely Held and Family Business Owners
FPA of Greater Memphis Visions in Planning Conference, Memphis, Tennessee

April 6, 2018
Answers to Business Owner's Most Important Questions Panel
UBS Private Business Symposium, Memphis, Tennessee

January 11, 2018
Confessions of a Reluctant Expert Witness
FIPCA Valuation, Forensic Accounting & Litigation Services Conference, Ft. Lauderdale, Florida

November 1, 2017
Confessions of a Reluctant Expert Witness
17th Annual MNCPA Business Valuation Conference, Plymouth, Minnesota

October 27, 2017
What Every Estate Planner Should Know About Buy-Sell Agreements
Southern Federal Tax Institute, Atlanta, Georgia

September 8, 2017
Business Valuation for Exit Planning
Exit Planning Institute, North Texas Chapter, Dallas, Texas

January 23, 2017
Unlocking Private Company Wealth
Society of Financial Service Professionals Arizona Institute, Litchfield, Arizona

November 25, 2016
EBITDA Single Period Income Capitalization for Business Valuation
EACVA Business Valuation Conference, Berlin, Germany

November 7, 2016
Key Valuation Discounts Panel
2016 AICPA Forensic & Valuation Services Conference, Nashville, Tennessee

November 4, 2016
An Integrated Theory of the Major Valuation Issues of Today
AAML Annual Meeting, Chicago, Illinois

September 26, 2016
Proposed Changes to Regulations Under IRS Code Section 2704 Issued August 2, 2016
Mercer Capital-Sponsored Webinar

June 22, 2016
The Expectations of a Growing Professional
Valuation Jubilee Webinar, Business Valuation Resources

June 10, 2016
Hardball with Hitchner
NACVA & CTI's 25th Anniversary Annual Consultants' Conference, San Diego, California

June 10, 2016
EBITDA Single Period Income Capitalization for Business Valuation
NACVA & CTI's 25th Anniversary Annual Consultants' Conference, San Diego, California

May 20, 2016
Battle Royale Panel
2016 AICPA/AAML National Divorce Conference, New Orleans, Louisiana

May 20, 2016
I Don't Buy It: The Effect of Buy-Sell Agreements in Divorce
2016 AICPA/AAML National Divorce Conference, New Orleans, Louisiana

May 12, 2016
Unlocking Private Company Wealth: Give Me Liberty (and Plenty of Cash)
American Bar Association Section of Real Property, Trust and Estate Law's Spring Symposia, Boston, MA

November 17, 2015
Unlocking Private Company Wealth
NACVA and the CTI's Exit Planning, Transaction Advisory Services, and Healthcare Valuation Conference, San Diego, California

November 17, 2015
Private Company Corporate Finance
NACVA and the CTI's Exit Planning, Transaction Advisory Services, and Healthcare Valuation Conference, San Diego, California

October 30, 2015
Unlocking Private Company Wealth
Kansas Society of CPAs, Kansas City, Missouri

October 27, 2015
Buy-Sell Agreements
Tennessee Society of CPAs, Nashville, Tennessee

October 27, 2015
Unlocking Private Company Wealth
Tennessee Society of CPAs, Nashville, Tennessee

October 19, 2015
Unlocking Private Company Wealth
The McGehee Group, Las Vegas, Nevada

October 19, 2015
There's More to Appraisal Review Than You Might Think
with Timothy R. Lee, ASA, American Society of Appraisers, Las Vegas, Nevada

September 1, 2015
Unlocking Private Company Wealth
with Edward Koren, Webinar, American Bar Association

August 5, 2015
Unlocking Private Company Wealth
Webinar, The M&A Source

June 22, 2015
Unlocking Private Company Wealth
Exit Planning Institute St. Louis Chapter, St. Louis, Missouri

May 20, 2015
A Deep Dive into the Family Business Ocean
Teleseminar, The Society of Financial Service Professionals' Pittsburgh Chapter

May 18, 2015
Business Divorce and Appraisers
Panel, New York Society of CPAs, New York, New York

May 18, 2015
Unlocking Private Company Wealth
New York Society of CPAs, New York, New York

May 6, 2015
Unlocking Private Company Wealth
National Financial Partners, Lafayette, California

May 6, 2015
Unlocking Private Company Wealth
National Financial Partners, Pleasant Hills, California

May 4, 2015
Unlocking Private Company Wealth
Interview, Norman Hood's "Exit Planning Show"

April 27, 2015
Unlocking Private Company Wealth
Interview, NACVA's "Around the Valuation World"

April 25, 2015
Unlocking Private Company Wealth
Mass Mutual, Las Vegas, Nevada

April 24, 2015
Unlocking Private Company Wealth
American Society of Appraisers Philadelphia Chapter, Plymouth Meeting, Pennsylvania

April 9, 2015
Unlocking Private Company Wealth
Interview, Roxanne Emmerich's "Chat with the Experts"

March 9, 2015
Unlocking Private Company Wealth
Partners Financial, Orlando, Florida

February 24, 2015
A Tutorial for Business Advisers
Webinar, American Society of Appraisers

January 14, 2015
Unlocking Private Company Wealth
with Timothy R. Lee, ASA, and Nicholas J. Heinz, ASA, Mercer Capital Sponsored Seminar, Orlando, Florida

January 13, 2015
Unlocking Private Company Wealth
with Timothy R. Lee, ASA, and Nicholas J. Heinz, ASA, Mercer Capital Sponsored Seminar, Orlando, Florida

January 5, 2015
Unlocking Private Company Wealth
Interview, Josh Patrick's "Exit Coach Radio"

November 18, 2014
Unlocking Private Company Wealth
Valuation Products and Services, Memphis, Tennessee

October 14, 2014
Unlocking Private Company Wealth
Young President's Organization, Memphis, Tennessee

August 15, 2014
Understanding Baby Boomer Business Owners: Options for Transitioning the Business
Society of Financial Service Professionals, Orlando, Florida

May 13, 2014
An Integrated Theory of Major Valuation Issues of Today
Webinar, Financial Consulting Group

April 25, 2014
The Defining Debate on the Hot Topics in Business Valuation
AICPA AAML National Conference on Divorce, Las Vegas, Nevada

April 24, 2014
The Five Really BIG Valuation Issues
AICPA AAML National Conference on Divorce, Las Vegas, Nevada

April 24, 2014
The Great Debate: The Future of Marketability Discounts Panel
AICPA AAML National Conference on Divorce, Las Vegas, Nevada

November 26, 2013
The Integrated Theory of Business Valuation
2nd International OIV Conference on Business Valuation, Milan, Italy

November 6, 2013
The Value of Brands Is in And at the Margin
2013 RICS Asia Valuation Conference, Tokyo, Japan

October 15, 2013
Business Valuation Standards
2013 Annual Conference of the American Society of Appraisers, San Antonio, Texas

September 17, 2013
Structuring Effective Buy-Sell Agreements
Exit Planning Institute Annual International Conference, Cleveland, Ohio

August 15, 2013
The Value in Discounting Discounts - Partial Interest Valuations and Discounts
IRS Valuation Summit, Los Angeles, California

July 11, 2013
Buy-Sell Agreements: An Interview
Webinar sponsored by the Exit Planning Institute

January 16, 2013
Buy-Sell Agreements for Attorneys
Firm Seminar Sponsored by Carlton Fields Law Firm, Tampa, Florida (broadcast to satellite offices)

December 18, 2012
Buy-Sell Agreements for Attorneys
Firm Seminar Sponsored by Bradley Arant Boult Cummings Law Firm, Birmingham, AL

December 12, 2012
The Hot Five Topics in Business Valuation Today
Financial Consulting Group-Sponsored Webinar

November 29, 2012
Buy-Sell Agreements for Closely Held & Family Business Owners
Firm Seminar Sponsored by Roth & Company, CPAs, New York, New York

November 12, 2012
Panel: "Hardball with Hitchner"
The 2012 AICPA Fraud & Business Valuation Annual Conference, Orlando, Florida

November 12, 2012
The Hot Five Topics in Business Valuation Today
The 2012 AICPA Fraud & Business Valuation Annual Conference, Orlando, Florida

October 25, 2012
Conference Keynote: The History of Business Valuation in the United States
The Institute of Australian Chartered Accountants, Melbourne, Australia

October 24, 2012
The Integrated Theory of Business Valuation Workshop
The Institute of Australian Chartered Accountants, Melbourne, Australia

July 25, 2012
Advanced Business Valuation Topics in 2012
American Academy of Matrimonial Lawyers-Sponsored Webinar

July 20, 2012
Buy-Sell Agreements for Estate Planners
Wealth Counsel 2012 Symposium, Denver, Colorado

May 21, 2012
Statutory Fair Value in New York
New York State Society of CPAs, New York, New York

May 16, 2012
Four Things You Need to Know about Buy-Sell Agreements
Wealth Counsel-Sponsored Webinar

May 11, 2012
Appraisal Wars: Bridging the Gap Between Accepted Valuation Methods, Legal Measures of Value in Divorce and the Things Appraisers Do *with Richard R. Orsinger, JD, AICPA/AAML National Divorce Conference, Las Vegas, Nevada*

November 1, 2011
Buy-Sell Agreements
Pennsylvania Institute of CPAs Business Valuation Conference, Harrisburg, Pennsylvania

October 21, 2011
Estate of Gallagher: How the Court Sees the State of Business Valuation
with L. Paul Hood, Jr., JD, LLM, Webcast sponsored by Business Valuation Resources

October 13, 2011
Buy-Sell Agreements
Western Michigan Society of Financial Services Professionals, Grand Rapids, Michigan

September 28, 2011
The New International Valuation Standards and What They Mean to Appraisers
The American Society of Appraisers-Sponsored Webinar

September 23, 2011
Buy-Sell Agreements and the Valuation of a Closely-Held Business
Tennessee Society of CPAs Business & Industry Conference, Memphis, Tennessee

September 15, 2011
Opinions of the IRS Critiques of the DLOM Studies, Databases and Model *with Travis W. Harms, CFA, CPA/ABV, Valuation Products & Services-Sponsored Webinar*

September 7, 2011
Buy-Sell Agreements
The American Bar Association Real Property Trust & Estate Law Section-Sponsored Webinar

August 18, 2011
Buy-Sell Agreements *with Louis A. Mezzullo, Esq.*
Webcast sponsored by the American Bar Association

August 9, 2011
Buy-Sell Agreements
Young Presidents Organization Forum, Memphis, Tennessee

August 2, 2011
Business Succession Planning
National Business Institute, Memphis, Tennessee

July 14, 2011
Standards and Premises of Value *with Travis W. Harms, CFA, CPA/ABV*
Webcast sponsored by the AICPA

July 11, 2011
Case Studies in Business Appraisal Review
The Business Valuation and Certification Training Center, Chicago, Illinois

June 28, 2011
Demystifying Statutory Fair Value
Financial Consulting Group-Sponsored Webinar

May 2, 2011
Buy-Sell Agreements: Understanding Dangers Present in Every Agreement
Current Topics in Business Valuation, New York Chapter of the ASA, New York, New York

April 29, 2011
Buy-Sell Agreements for Closely Held and Family Business Owners
American Academy of Matrimonial Lawyers Family Law Seminar, Orlando, Florida

April 28, 2011
LinkedIn for Attorneys
American Academy of Matrimonial Lawyers Family Law Seminar, Orlando, Florida

January 18, 2011
The Business Appraiser's Buy-Sell Agreement Business Development Plan
Mercer Capital-Sponsored Webinar

October 26, 2010
How to Know Your Buy-Sell Agreement Will Work Without Triggering It
Mercer Capital-Sponsored Webinar

October 22, 2010
Buy-Sell Agreements for Closely Held and Family Business Owners
Tennessee Society of CPAs Forensics & Valuation Services Conference, Brentwood, Tennessee

October 6, 2010
Issues for the Management of an International Business Valuation Assignment
ASA/CICBV 2010 Annual Conference, Miami, Florida

October 4, 2010
The Market vs. The Income Approach
ASA/CICBV 2010 Annual Conference, Miami, Florida

September 15, 2010
Buy-Sell Agreements in Business and in Life
Rotary Club Meeting, Memphis, Tennessee

August 27, 2010
Buy-Sell Agreements for Closely Held and Family Business Owners
B.I.G. Breakfast Meeting, Ft. Lauderdale, Florida

August 26, 2010
Buy-Sell Agreements for Closely Held and Family Business Owners
Blueprints for Business Owners, Ft. Lauderdale, Florida

August 19, 2010
Buy-Sell Agreements for Closely Held and Family Business Owners
Valuation Products and Services and Financial Consulting Group-Sponsored Webinar

August 11, 2010
Discounts for Lack of Marketability
Business Valuation Resources-Sponsored Webinar

June 2, 2010
Marketability Discounts and Business Valuation Standards
NACVA and the IBA 2010 Annual Consultants' Conference, Miami, Florida

June 2, 2010
Professional Services Networking – Your LinkedIn Primer
NACVA and the IBA 2010 Annual Consultants' Conference, Miami, Florida

May 7, 2010
Attorney Tricks/Witness Traps: The Litigation Wars, *with Jeffrey Brend, JD, CPA/ABV, ASA, CFE, AAML*
AICPA/AAML National Divorce Conference, Las Vegas, Nevada

May 7, 2010
Subsequent Events
AICPA/AAML National Divorce Conference, Las Vegas, Nevada

April 17, 2010
Buy-Sell Agreements
ACTEC Regional Meeting, Knoxville, Tennessee

April 15, 2010
Rebuilding the Economic Value of Your Business
Transitions: The Changing Environment for Family Companies, Celebration, Florida

January 8, 2010
Subsequent Events
Business Valuation Resources-Sponsored Teleseminar

January 7, 2010
Subsequent Events: Known or Knowable
Valuation, Forensic Accounting, and Litigation Services Conference, Ft. Lauderdale, Florida

November 16, 2009
Buy-Sell Agreements
AICPA Business Valuation Conference, San Francisco, California

October 19, 2009
So You Want to Be an Expert?
Southern Federal Tax Institute, Atlanta, Georgia

October 15, 2009
How to Know Your Buy-Sell Agreement Will Work Without Triggering It
Mercer Capital-Sponsored Webinar

September 24, 2009
Rate and Flow: Determining Active/Passive Appreciation in Marital Dissolutions
BV Resources Divorce Summit, Chicago, Illinois

September 18, 2009
"Buy-Sell Agreements" and "Valuation Discounts"
Mid-South Estate Planning Council, Memphis, Tennessee

July 29, 2009
You'll Never Think of Buy-Sell Agreements the Same Way Again
Blueprints for Tomorrow-Sponsored Webinar

May 27, 2009
Discounts for Lack of Marketability and Subsequent Events
2009 NACVA Annual Conference, Boston, Massachusetts

April 29, 2009
Buy-Sell Agreements and The One Percent Solution
Hoosier Hills Estate Planning Council, Bloomington, Indiana

February 17, 2009
Thinking About Value
John Deere Executive Leadership & Management Development Conference, Overland Park, Kansas

February 6, 2009
Active vs. Passive Appreciation
American Academy of Matrimonial Lawyers, Greensboro, North Carolina

November 11, 2008
Fairness Opinions
AICPA/ASA Business Valuation Conference, Las Vegas, Nevada

September 18, 2008
The Quantitative Marketability Discount Model
Summit on Discount for Lack of Marketability, San Diego, California

September 16, 2008
Rate & Flow: Determining Active/Passive Appreciation in Marital Dissolutions
Divorce: A Hands-On Workshop for BV Practitioners, Atlanta, Georgia

September 12, 2008
Understanding Buy-Sell Agreements: What Attorneys Must Know
with Paul L. Hood, Esq. and Hugh Q. Gottschalk, JD, Teleseminar sponsored by BV Resources Legal

September 8, 2008
Buy-Sell Agreements: Ticking Time Bombs or Reasonable Resolutions?
Miller & Martin, PLLC – Firm-wide presentation

May 12, 2008
Wealth Creation, Asset Management, and Estate Planning
Independent Business Leadership Executives Forum, Orlando, Florida

April 22, 2008
The Analyst's Guide to SFAS 157 and the Valuation of Illiquid Assets *with Travis W. Harms, CFA, CPA/ABV, CFA Society of Memphis, Memphis, Tennessee*

January 13, 2008
Buy-Sell Agreements: Ticking Time Bombs or Reasonable Resolutions?
ING International Forum, Miami, Florida

December 5, 2007
Buy-Sell Agreements
American Society of Appraisers, Maryland Chapter, Baltimore, Maryland

December 5, 2007
Discount Tango and The Integrated Theory of Business Valuation
Baltimore Estate Planning Council, Baltimore, Maryland

December 3, 2007
An Integrated Theory of Business Valuation
AICPA Business Valuation Annual Conference, New Orleans, Louisiana

December 2, 2007
Discounts for Lack of Marketability Panel
AICPA Business Valuation Annual Conference, New Orleans, Louisiana

November 20, 2007
Buy-Sell Agreements
Financial Executives International Meeting, Memphis, Tennessee

October 9, 2007
The One Percent Solution
The McGehee Group Conference, Las Vegas, Nevada

September 19, 2007
The Cash Flow IQ: A Tool for Fundamental Financial Insights
CFA Society of Houston, Houston, Texas

September 18, 2007
The Cash Flow IQ: A Tool for Fundamental Financial Insights
CFA Society of Dallas, Dallas, Texas

September 17, 2007
The One Percent Solution
Partners Financial Private Business Group Conference, Chicago, Illinois

July 19, 2007
Buy-Sell Agreements: Opportunities and Challenges for Business Appraisers
Part Three of Teleseminar Series sponsored by BV Resources and Mercer Capital

June 21, 2007
Buy-Sell Agreements: Ticking Time Bomb or Reasonable Resolution?
Institute of Business Appraisers 2007 Annual Conference, Denver, Colorado

June 14, 2007
The Planner's Role in Buy-Sell Agreements
Part Two of Teleseminar Series sponsored by BV Resources and Mercer Capital

May 24, 2007
You'll Never Think of Buy-Sell Agreements The Same Way Again
Part One of Teleseminar Series sponsored by BV Resources and Mercer Capital

February 22, 2007
Buy-Sell Agreements: Ticking Time Bomb or Reasonable Resolution?
Duff & Phelps – Firm-wide presentation

February 19, 2007
Buy-Sell Agreements: Ticking Time Bombs or Reasonable Resolutions?
Heartland Business Roundtable Radio Show

January 11, 2007
Buy-Sell Agreements: Ticking Time Bomb or Reasonable Resolution?
Georgia Society of CPAs, Atlanta, Georgia

December 3, 2006
Buy-Sell Agreements: Ticking Time Bomb or Reasonable Resolution?
AICPA Business Valuation Conference, Austin, Texas

October 20, 2006
Today's Word on Lack of Marketability
CICBV/ASA Annual Conference, Toronto, Canada

September 18, 2006
Buy-Sell Agreements: Ticking Time Bomb or Reasonable Resolution?
Virginia Society of CPA's Business Valuation, & Litigation Services Conference, Richmond, Virginia

August 25, 2006
Buy-Sell Agreements: Ticking Time Bomb or Reasonable Resolution?
Business Enterprise Institute 2006 Annual Exit Planning Conference, Denver, Colorado

June 15, 2006
Present Value, Business Valuation Basics & Buy-Sell Agreements
Polsinelli Shalton Welte Suelthaus PC Business Law Institute, St. Louis, Missouri

June 13, 2006
The QMDM: A Shareholder-Level DCF
Mercer Capital-Sponsored Webinar

June 5, 2006
Buy-Sell Agreements: A Business Appraiser's Perspective
Burch Porter & Johnson Law Firm – Firm-wide presentation

June 1, 2006
Buy-Sell Agreements: Ticking Time Bomb or Reasonable Resolution?
2006 National Association of Certified Valuation Analysts, Business Valuation Conference, San Francisco, California

May 18, 2006
Buy-Sell Agreements: A Business Appraiser's Perspective
Baker & Hostetler Law Firm – Firm-wide presentation

May 2, 2006
Viewpoints on Value
Philadelphia Estate Planning Council, Philadelphia, Pennsylvania

March 30, 2006
Buy-Sell Agreements: Ticking Time Bomb or Reasonable Resolution?
Mercer Capital-Sponsored Webinar

March 9, 2006
Marketing Your BV Practice
Business Valuation Resources and Mercer Capital-Sponsored Webinar

February 20, 2006
Buy-Sell Agreements: A Business Appraiser's Perspective
Butler Snow Law Firm – Firm-wide presentation

January 25, 2006
Buy-Sell Agreements: A Business Appraiser's Perspective
Glankler Brown Law Firm – Firm-wide presentation

January 18, 2006
Is Your Business Ready for Sale? – Session Three
Teleseminar sponsored by Mercer Capital

December 14, 2005
Is Your Business Ready for Sale? – Session Two
Mercer Capital-Sponsored Teleseminar

November 10, 2005
Buy-Sell Agreements: A Business Appraiser's Perspective
Baker Donelson Law Firm – Firm-wide presentation

November 2, 2005
Is Your Business Ready for Sale? – Session One
Mercer Capital-Sponsored Teleseminar

September 30, 2005
The Integrated Theory of Business Valuation
8th Annual Conference of the Arizona Society of CPAs, Phoenix, Arizona

June 10, 2005
Financial Institutions: Valuation & Value Drivers
Financial Institutions Forum, PKF North American Network, Atlanta, Georgia

June 2, 2005
The Integrated Theory of Business Valuation
2005 National Association of Certified Valuation Analysts, Business Valuation Conference, Philadelphia, Pennsylvania

May 20, 2005
Business Valuation & Exit Strategies
National Association of Personal Finance Advisors National Conference, Tampa, Florida

May 19, 2005
The Integrated Theory of Business Valuation
2005 Business Valuation Conference, Atlanta, Georgia

May 13, 2005
Business Valuation and What Does Fair Market Value Really Mean?
2005 Bankruptcy and Commercial Law Seminar, UALR Bowen School of Law, Little Rock, Arkansas

November 8, 2004
The Integrated Theory of Business Valuation
AICPA 2004 Business Valuation Conference, Orlando, Florida

October 21, 2004
The Integrated Theory of Business Valuation
Closely Held Investment Workshop, Westbrook, Connecticut

October 8, 2004
Valuing Financial Institutions
American Society of Appraisers' 2004 Business Valuation Conference, San Antonio, Texas

September 21, 2004
Integrating the DCF and Gordon Models with the Discount Rate of the ACAPM: The Theory and Practical Tips
The Financial Consulting Group and Mercer Capital-Sponsored Teleseminar

September 13, 2004
Mergers & Acquisitions
Annual Member Conference, Federal Home Loan Bank, Carlsbad, California

July 19, 2004
It's Your Business: Understanding & Building Transferable Value
National Speakers Association 2004 Convention, Phoenix, Arizona

June 7, 2004
The Outlook for Mergers of Equals
Darling Consulting Group, Newburyport, Massachusetts

May 17, 2004
The Integrated Theory of Business Valuation
New York Society of CPA's, New York, New York

March 18, 2004
Real World Reflections on Business Value
Vanderbilt University – Owen Graduate School of Management, Nashville, Tennessee

November 18, 2003
Sarbanes-Oxley: What It Means to Business Appraisers
AICPA Business Valuation Conference, Phoenix, Arizona

November 18, 2003
Issues in Lack of Marketability Discounts
AICPA Business Valuation Conference, Phoenix, Arizona

October 17, 2003
S Corporation Valuation Issues
American Society of Appraisers' Advanced Business Valuation Conference, Chicago, Illinois

October 17, 2003
Opportunities & Challenges for Appraisers under Sarbanes-Oxley: A New Arena for the Appraisal Profession
American Society of Appraisers' Advanced Business Valuation Conference, Chicago, Illinois

September 25, 2003
The Integrated Theory of Business Valuation
Workshop for Managing Closely Held Business Interests in Estates and Trusts, Cleveland, Ohio

September 15, 2003
The Integrated Theory of Business Valuation
Financial Consulting Group Annual Fall Conference, Memphis, Tennessee

July 14, 2003
Sarbanes-Oxley: What it Means to Business Appraisers
American Society of Appraisers' International Conference, Tampa, Florida

May 31, 2003
Current Valuation Techniques and Theories: The QMDM
ACTEC Annual Southern Region Seminar, Lexington, Kentucky

May 9, 2003
Sarbanes-Oxley's Impact on Appraisal Work
Current Topics in Business Valuation, New York City Chapter of the ASA, New York, New York

February 4, 2003
The Integrated Theory of Business Valuation
Los Angeles Business Valuation Chapter of the American Society of Appraisers, Los Angeles, California

January 24, 2003
S Corporation Valuation Issues
American Bar Association S Corporation Committee Mid-Year Meeting, San Antonio, Texas

October 26, 2002
The Integrated Theory of Business Valuation
ASA/CICBV 5th Annual Joint Business Valuation Conference, Orlando, Florida

September 23, 2002
Shareholder Value Management for Independent Community Banks
2002 Financial Institutions Conference of the Tennessee Society of CPAs, Nashville, Tennessee

September 19, 2002
S Corporation Valuation
Business Valuation Association of Chicago, Chicago, Illinois

August 27, 2002
S Corporation Valuation
American Society of Appraisers' 2002 International Appraisal Conference, San Diego, California

August 13, 2002
Tax Affecting S Corporation Earnings
BV Resources Teleseminar with Dr. Mukesh Bajaj, George Hawkings, and Dr. Shannon Pratt

August 6, 2002
The Finer Points of Balance Sheet Valuation: Core Deposit Intangible Asset Valuation
SNL Center for Financial Education 2002 Analyst Training, University of Virginia, Charlottesville, Virginia

May 24, 2002
Quantifying Marketability Discounts – The 10th Round
2002 NACVA Annual Business Valuation Conference, San Diego, California

May 10, 2002
S Corporation Valuation Controversy
American Society of Appraisers (New York Chapter), New York, New York

May 10, 2002
The Integrated Theory of Business Valuation
American Society of Appraisers (New York Chapter), New York, New York

November 30, 2001
Marketability and Minority Interests Discounts in Divorce
2001 NACVA Regional Symposium, Las Vegas, Nevada

November 16, 2001
Current Issues in Business Valuation
Tennessee Society of CPAs, Franklin, Tennessee

October 26, 2001
Important Issues in the Valuation Process
Corporate Finance, University of Memphis, School of Law, Memphis, Tennessee

September 28, 2001
Fundamentals & Controversies in Valuation
Business Valuation Seminar, Family Law Section of the Tennessee Bar Association, Memphis, Tennessee

August 1, 2001
How to Review a Business Valuation Report
IRS, LMSB Engineering Continuing Professional Education, Houston, Texas

July 23, 2001
The Quantitative, Rate of Return Analysis vs. a Benchmark Analysis for the Development of Marketability Discounts
American Society of Appraisers' International Conference, Pittsburgh, Pennsylvania

July 7, 2001
What Every Business Owner Needs to Know About Maximizing Value
Young President's Organization Family Meeting, Montebello, Quebec

July 6, 2001
Is Your Business Ready For Sale?
Young President's Organization Family Meeting, Montebello, Quebec

May 11, 2001
The Quantitative, Rate of Return Analysis for the Development of Marketability Discounts
Institute of Business Appraisers 2001 National Conference, Orlando, Florida

April 19, 2001
Valuation Issues of Interest to Commercial Bankers
Risk Management Association, Memphis, Tennessee

January 12, 2001
Discounts & Premiums Meet the Levels of Value
Litigation & Valuation Services Conference of the Florida Institute of CPAs, Miami, Florida

November 13, 2000
Discounts & Premiums Meet the Levels of Value
2000 AICPA National Business Valuation Conference, Miami, Florida

November 8, 2000
How the Market Values Your Business
Mercer Capital's Uncovering Pathways to Liquidity Seminar, Memphis, Tennessee

August 30, 2000
Discounts & Premiums Meet the Levels of Value
Internal Revenue Service, Fort Monmouth, New Jersey

July 25, 2000
A Conceptual Overview & Perspectives on the Tax Court
Mercer Capital's Business Valuation Boot Camp, Memphis, Tennessee

July 11, 2000
Discounts and Premiums Meet Levels of Value: The Final Chapter & The Deal
Valuation 2000, Las Vegas, Nevada

December 3, 1999
An Overview of Current Business Valuation Issues & Is Your Business Ready for Sale?
Georgia Society of Certified Public Accountants, Savannah, Georgia

December 1, 1999
An Overview of Current Business Valuation Issues
Tax Watch, Memphis, Tennessee

November 17, 1999
Is Your Business Ready for Sale?
University of Tennessee/First American Center for Closely Held Firms, Knoxville, Tennessee

November 16, 1999
Is Your Client's Business Ready for Sale? Shareholder Value Added for the 21st Century
Tennessee Society of Certified Public Accountants, Franklin, Tennessee

November 5, 1999
An Overview of Current Business Valuation Issues & Is Your Business Ready for Sale?
Georgia Society of Certified Public Accountants, Atlanta, Georgia

October 22, 1999
Advanced Virtual Valuation Case Study of an Auto Dealership
1999 AICPA National Auto Dealership Conference, Las Vegas, Nevada

October 8, 1999
Private Businesses Change Hands Frequently: Are Your Clients Ready? and An Overview of Current Business Valuation Issues
Mobile Estate Planning Council, Mobile, Alabama

September 14, 1999
An Overview of Current Business Valuation Issues
Snell & Wilmer, L.L.P., Phoenix, Arizona

August 25, 1999
An Overview of Current Business Valuation Issues
Baker Donelson Bearman & Caldwell, Memphis, Tennessee

August 18, 1999
The Theoretical Determinants of Value in the Context of "Levels of Value"
American Society of Appraisers International Conference, Boston, Massachusetts

June 24, 1999
An Overview of Current Business Valuation Issues
American Institute on Federal Taxation, Birmingham, Alabama

June 21 - 22, 1999
Bank Capital Management for Dummies
15th Annual Balance Sheet Management Conference, Boston, Massachusetts

June 16, 1999
Valuation Issues in Passing on the Family Business
6th Annual Family Office Forum (The IIR Wealth Management Series), Dallas, Texas

May 15, 1999
Business Valuation Trilogy
The American College of Trust and Estate Counsel, Quad State Regional Meeting, Little Rock, Arkansas

May 3, 1999
Is Your Business Ready for Sale?
FMI Supermarket Industry Convention and Educational Exposition, Chicago, Illinois

February 5, 1999
Quantifying Marketability Discounts
1999 Institute of Business Appraisers National Conference, Orlando, Florida

November 30, 1998
Valuation Issues
Waring Cox Law Firm, Memphis, Tennessee

November 24, 1998
Valuing Family Limited Partnerships & Valuation Discounts
Memphis Estate Planning Council, Memphis, Tennessee

November 16, 1998
What's Fair? Ins and Outs of Fairness Opinions
1998 AICPA National Business Valuation Conference, Palm Beach Gardens, Florida

October 16, 1998
Quantifying Marketability Discounts
National Trust Closely Held Business Association, Lake Harmony, Pennsylvania

September 24, 1998
Control and Synergy Premiums
1998 CICBV/ASA Joint Business Valuation Conference, Toronto, Canada

September 10, 1998
Quantifying Marketability Discounts & Building a Business Appraisal Business
California Society of Certified Public Accountants, Los Angeles, California

July 23, 1998
Quantifying Marketability Discounts & Developing a Business Valuation Practice
National Litigation Support Services, Lake Tahoe, California

May 28, 1998
Quantifying Marketability Discounts
1998 NACVA Annual Conference, Washington, DC

May 8, 1998
What's Fair? Ins and Outs of Fairness Opinions
American Society of Appraisers (New York Chapter), New York, New York

March 31, 1998
Quantifying Marketability Discounts & Building a Business Appraisal Business
Private Seminar at Crowe Chizek and Company, LLP

February 12, 1998
Discounts & Premiums
The 11th Annual Unitary Appraisal School, Utah State University, Logan, Utah

January 31, 1998
Big Fish Eat Little Fish, Little Fish Bite Back
1998 Institute of Business Appraisers National Conference, San Antonio, Texas

January 8, 1998
Current Trends in Marketability Discounts
California CPA Education Foundation, San Francisco, California

December 5, 1997
What Every Attorney Should Know About Business Appraisal
Alabama Bar Institute Estate Planning Seminar, Birmingham, Alabama

November 17, 1997
Discounts & Premiums
1997 AICPA National Conference on Business Valuation, San Diego, California

November 11, 1997
Quantifying Marketability Discounts
Association for Corporate Growth (Raleigh Chapter), Raleigh, North Carolina

October 25, 1997
Quantifying Marketability Discounts
Mercer Capital Seminar, San Francisco, California

October 23, 1997
Fairness Opinions
American Society of Appraisers Advanced Business Valuation Conference, San Francisco, California

October 1, 1997
Valuing an ESOP Company
NBC Bank & Executive Financial Services, Memphis, Tennessee

September 25, 1997
Quantifying Marketability Discounts
Business Valuation Association Seminar, Chicago, Illinois

August 18, 1997
Quantifying Marketability Discounts
CPA Associates International, Inc., 1997 Business Valuation Seminar, Baltimore, Maryland

August 4, 1997
Differences in the Risk and Expected Return Investment Characteristics
Appraisal for Ad Valorem Taxation of Communications, Energy & Transportation Properties, Wichita, Kansas

April 23, 1997
Reflections of a Business Appraiser: Building Business and Personal Value
Professional Secretaries' Luncheon, Memphis, Tennessee

March 20, 1997
Valuing an ESOP Company
SouthTrust Bank & Executive Financial Services, Birmingham, Alabama

January 14, 1997
Valuing an ESOP Company
SouthTrust Bank & Executive Financial Services, Birmingham, Alabama

December 12, 1996
Business Valuation: Topics of Interest
Young Presidents' Organization, Memphis, Tennessee

November 22, 1996
Is Your Business Ready for Sale?
The 50th Annual Federal Tax Clinic, Tuscaloosa, Alabama

September 17, 1996
Valuation of Family Business Entities & Quantifying Marketability Discounts
Estate Planning Council of Mississippi, Jackson, Mississippi

July 19, 1996
Valuation of Family Business Entities
23rd Annual Midwest/Mid South Estate Planning Institute, University of Kentucky College of Law, Lexington, Kentucky

July 17-18, 1996
Discounts & Premiums
New York State Society of Certified Public Accountants Business Valuation Conference, New York, New York

June 26, 1996
Value = Earnings/CR: What is CR? and 50 Other Questions about Capitalization Rates
199 AICPA National Conference on Divorce, San Francisco, California

June 26, 1996
What Revenue Ruling 59-60 Does (and Doesn't) Say
1996 AICPA National Conference on Divorce, San Francisco, California

June 7, 1996
Minority Interests and Marketability Discount:
Twelfth Biennial Business Valuation Conference of the Canadian Institute of Chartered Business Valuators, Toronto, Ontario Canada

April 18, 1996
Valuing Family Limited Partnerships
Nashville Bar Association: 1996 Estate Planning CLE Series, Nashville, Tennessee

March 13, 1996
Understanding and Quantifying Marketability Discounts
Los Angeles Chapter of the American Society of Appraisers, Los Angeles, California

February 26, 1996
Valuing Family Limited Partnerships
Stites & Harbison Law Firms

February 20, 1996
Valuing Family Limited Partnerships
Wyatt, Tarrant & Combs Law Firms

February 8, 1996
Reflections of a Business Appraiser: Building Personal and Personal Value
Rotary Club, Covington, Tennessee

January 25-26, 1996
Public Multiples/Private Companies
1996 Institute of Business Appraisers National Conference, Orlando, Florida

January 3, 1996
Quantifying Marketability Discounts
Tax Watch, Memphis, Tennessee

October 4, 1995
Family Limited Partnerships Valuation
Tax Watch Breakfast Group, Memphis, Tennessee

August 4, 1995
Reflections of a Business Appraiser: Building Business and Personal Value
Rotary Club, New Albany, Mississippi

June 20, 1995
Is the "Levels of Value" Concept Still Viable?
American Society of Appraisers International Conference, Denver, Colorado

May 16, 1995
Is Your Business Ready for Sale? The Business Owner's Guide to Shareholder Value
Association for Corporate Growth (Boston Chapter), Boston, Massachusetts

May 9, 1995
Developing & Defending Marketability Discounts
American Society of Appraisers (New York Chapter), New York, New York

November 15, 1994
How Much Should You Pay? Methodologies for the Valuation of Distressed Bonds
Strategic Research Institute, New York, New York

November 4, 1994
Public Multiples/Private Companies
Joint ASA/CICBV Conference, San Diego, California

November 3, 1994
Quantifying Marketability Discounts
Joint ASA/CICBV Conference, San Diego, California

October 28, 1994
Valuation as an Estate Planning Tool
Singleton B. Wolfe Federal Tax Conference, University of Tennessee, Knoxville, Tennessee

October 19, 1994
Quantitative Marketability Discount Methodology
Heiskell, Donelson, Bearman, Adams, Williams & Caldwell, Memphis, Tennessee

October 13, 1994
Is Your Business Ready for Sale?: The Business Owner's Guide to Business Shareholder Value
Life's Cycles Seminar, Memphis, Tennessee

September 27, 1994
Building Shareholder Value Does Not Mean Having to Sell Your Bank
Arkansas Community Banker's Seminar, Little Rock, Arkansas

July 11, 1994
Building Shareholder Value Does Not Mean Having to Sell Your Bank
Tri-State League of Savings Institutions, Orange Beach, Alabama

June 6, 1994
Building Shareholder Value
Balance Sheet Management Conference, Boston, Massachusetts

April 26, 1994
Valuing an ESOP
National Center for Employee Ownership, New Orleans, Louisiana

March 17, 1994
A Brief Overview of Valuation Issues
Tennessee Bar Association, Memphis, Tennessee

February 15, 1994
The Value of Your Business
Detroit Chapter of the Association for Corporate Growth, Detroit, Michigan

January 28, 1994
Business Valuation Standards
Institute of Business Appraisers, Orlando, Florida

October 19, 1993
Valuation as an Estate Planning Tool
Mississippi Estate Planning Council, Jackson, Mississippi

October 15, 1993
Shareholder Value Planning
Arkansas Association of Bank Holding Companies, Little Rock, Arkansas

October 13, 1993
The Valuation of Smaller Banks
National Trust Closely-Held Business Association, Jekyll Island, Georgia

October 7, 1993
Shareholder Value Planning
Bank Holding Company Association of Minnesota, Minneapolis, Minnesota

September 23, 1993
Valuation as an Estate Planning Tool
Chattanooga Estate Planning Council, Chattanooga, Tennessee

September 21, 1993
Valuation as an Estate Planning Tool
Estate Planning Council of Northwestern Florida, Fort Walton Beach, Florida

June 29, 1993
Shareholder/Stakeholder Value Planning
MS/AR League of Savings Institutions, Sandestin Beach, Florida

May 4, 1993
What is Your Bank Worth?
Balance Sheet Management Conference, Boston, Massachusetts

April 1, 1993
Tax-Advantaged Stock Transactions for Closely Held Corporations
Midwest Finance Association, Indianapolis, Indiana

May 16, 1993
Valuation as an Estate Planning Tool
Associated Builders and Contractors, Las Vegas, Nevada

January 29, 1993
Building Value: A Business and Personal Imperative
The Phoenix Club, Memphis, Tennessee

January 19, 1993
Valuation as an Estate Planning Tool
Marion County Estate Planning Council, Ocala, Florida

January 6, 1993
Valuation of Closely Held Businesses
Seminar Series Sponsored by the Tennessee Bar Association and the Tennessee Society of CPAs, Memphis, Knoxville, and Nashville, Tennessee

November 13, 1992
What's Your Bank Worth?
1992 Bank Directors and Senior Management Conference, Wyoming Bankers Association, Billings, Montana

October 22, 1992
Valuing Financial Institutions: An Industry Perspective
Business Valuation Association, Chicago, Illinois

September 28, 1992
Real World Applications of the Capital Asset Pricing Model
FMA Student Group of Memphis State University, Memphis, Tennessee

September 17, 1992
Valuation as an Estate Planning Tool
Louisville Estate Planning Council, Louisville, Kentucky

September 14, 1992
Valuing Financial Institutions
Tennessee Society of CPAs, Nashville, Tennessee

August 26, 1992
An Analyst's Perspective on Increasing Bank Productivity
Union Planters Corporation Regional Group, Memphis, Tennessee

June 25, 1992
An Industry Focus: Valuing Financial Institutions
American Society of Appraisers International Conference, New Orleans, Louisiana

May 28, 1992
What's Your Bank Worth?
Mississippi Bankers Association Annual Convention, Panama City, Florida

March 26, 1992
Valuation as an Estate Planning Tool
Carolinas AGC Business Succession Seminar, Charlotte, North Carolina

December 12, 1991
Using Business Valuation to Identify and Reduce Banker's Risk
Mississippi Regulatory Compliance Group, Jackson, Mississippi

April 25, 1991
Valuation as an Estate Planning Tool
International Association for Financial Planning, Jackson, Mississippi

April 24, 1991
The Adjusted Capital Asset Pricing Model
The Family Business Forum, Chicago, Illinois

January 22, 1991
Valuation as an Estate Planning Tool
Memphis Estate Planning Council, Memphis, Tennessee

June 25, 1990
Capitalization Rates for Closely Held Companies
American Society of Appraisers International Conference, Long Beach, California

May 23, 1990
Valuation After the Leveraged ESOP Transaction
ESOP Association Annual Conference, Washington, DC

March 22, 1990
Capitalization Rates for Closely Held Companies
Business Valuation Association, Chicago, Illinois

February 2, 1990
A Case Law Update for Business Appraisers
American Society of Appraisers, Salt Lake City, Utah

December 7, 1989
Employee Stock Ownership Plans
Tennessee Valley Employee Benefits Council, Knoxville, Tennessee

October 25, 1989
Valuation Issues
National Center for Employee Ownership Workshop, Louisville, Kentucky

October 9, 1989
A Banker's Introduction to Business Valuation
Sovran Bank, Memphis, Tennessee

June 26, 1989
A Case Law Update for Business Appraisers
American Society of Appraisers International Conference, St. Louis, Missouri

June 1, 1989
Appraisal for ESOPs
National Center for Employee Ownership, Nashville, Tennessee

May 24, 1989
Appraisal for ESOPs
ESOP Association, Washington, DC

October 26, 1988
Branching and Interstate Banking: Impact on Bank Stock Values
Arkansas Association of Bank Holding Companies, Little Rock, Arkansas

October 4, 1988
Bank Valuation
Virginia Bankers Association, Charlottesville, Virginia

September 16, 1988
A Banker's Introduction to Business Valuation
Deposit Guaranty National Bank, Jackson, Mississippi