**Monday, August 3, 2020**

*Times shown below are in Eastern time zone.*

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Details</th>
</tr>
</thead>
</table>
| 10:30–10:40 a.m. | Welcome!  
Conference Chairs/Committee                                                   |
| 10:40–11:30 a.m. | *Around the Valuation World Morning Show*  
*Around the Valuation World Correspondents*                                        |
| 11:30–11:45 a.m. | **BREAK**  
**SESSION TRACKS**  
Track One: Business Applications, Communication, and Practice Management  
Track Two: Specialty Areas of Practice  
Track Three: Healthcare  
Track Four: Moderated by Jessica Bailey-Wheaton and Todd Zigrang                  |
| 11:45 a.m.–1:25 p.m. | 2 Hrs CPE  
Cloud Migration Best Practices—Practical Guidance for Sole Practitioners and Small Accounting Firms  
By Ben Podraza  
The New Rules of Marketing—What's Working Now  
By Lee Frederiksen  
Emerging Issues in the Cannabis and Hemp Industries—Hot Buttons, Lessons Learned, and Trap Doors  
By Ryan Cram, Ron Seigneur  
Regulatory Overview for Valuation Professionals  
By Healthcare Experts Panel                                                     |
| 1:25–1:40 p.m. | **BREAK**  
**SESSION TRACKS**  
Track One: Mel Abraham  
A New Way of Thinking, A New Path to Growth—Building Your Business in the New Decade  
Track Two: Greg Chambers  
Build the Never Ending Pipeline—How to Consistently Bring New Opportunities into Your Firm  
Track Three: Shannon Shipp  
Calculating Lost Earnings or Lost Economic Support for Truck Drivers  
Track Four: Healthcare Experts Panel                                              |
| 1:40 p.m.–2:30 p.m. | 1 Hr CPE  
Build the Never Ending Pipeline—How to Consistently Bring New Opportunities into Your Firm  
By Greg Chambers  
Information Forthcoming  
The Due Diligence Imperative in the Era of Value-Based Reimbursement  
By Healthcare Experts Panel                                                      |
| 2:30 p.m.–3:30 p.m. | **LUNCH BREAK**  
**SESSION TRACKS**  
Track One: Paul Hamann, Stephen Kirkland  
Normalizing Owner Compensation with RCReports Demonstration  
Track Two: Rod Barkert  
Never Waste A Good Crisis—Create a Minimum Viable Service  
Track Three: Shannon Shipp  
Calculating Lost Earnings or Lost Economic Support for Truck Drivers  
Track Four: Healthcare Experts Panel                                              |
| 3:30–5:10 p.m. | 2 Hrs CPE  
Normalizing Owner Compensation with RCReports Demonstration  
By Paul Hamann, Stephen Kirkland  
Never Waste A Good Crisis—Create a Minimum Viable Service  
By Rod Barkert  
Calculating Lost Earnings or Lost Economic Support for Truck Drivers  
By Shannon Shipp  
The Valuation of Healthcare Enterprises in a Changing Reimbursement Environment  
By Healthcare Experts Panel                                                      |
| 5:10–5:25 p.m. | **BREAK**  
**SESSION TRACKS**  
Track One: Robert Schlegel  
Ooops! How to Avoid a Trip to the Ethics Committee  
Track Two: Thomas Smale  
How to Value and Sell a Content or SaaS Business  
Track Three: Healthcare Experts Panel                                              |
| 5:25–6:15 p.m. | 1 Hr CPE  
Ooops! How to Avoid a Trip to the Ethics Committee  
By Robert Schlegel  
How to Value and Sell a Content or SaaS Business  
By Thomas Smale  
Stark Law Modernization—The Healthcare Valuation Implications  
By Healthcare Experts Panel                                                      |

Sessions and Presenters subject to change.
## Conference Schedule

**Tuesday, August 4, 2020**

*Times shown below are in Eastern time zone.*

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Details</th>
</tr>
</thead>
</table>
| 10:00–10:10 a.m. | Welcome!  
*Conference Chairs/Committee* |
| 10:10–11:50 a.m. | Solid Numbers, Cutting Edge Methodology, and Thorough Research—Are They Enough to Persuade the Judges?  
Moderated by Michael Kaplan; Panel: Honorable Judge Timothy S. Driscoll, Honorable Judge Elizabeth Gonzalez, Honorable Judge Steven I. Platt (Ret.), Honorable Judge Christopher P. Yates |
| 11:50 a.m.–12:05 p.m. | BREAK |
| 12:05–1:45 p.m. | SESSION TRACKS  
Track One: Business Applications, Communication, and Practice Management  
Track Two: Specialty Areas of Practice  
Track Three: Healthcare  
Moderated by Jessica Bailey-Wheaton and Todd Zigrang |
| 1:45–2:45 p.m. | LUNCH BREAK |
| 2:45–3:35 p.m. | Dealing with Cybersecurity Risk in Business Valuation  
*Raymond Hutchins, Dave Miles*  
Working Together—Valuations for Financial Reporting Intertwine the Tangible and Intangible  
*Douglas Krieser*  
Development of a Commercial Reasonableness Opinion  
*Healthcare Experts Panel* |
| 3:35–3:50 p.m. | BREAK |
| 3:50–5:30 p.m. | Red Flags to Fraud/Misrepresentation in a Small Business Valuation  
*Dr. Robert K. Minniti*  
Becoming a Strategic Growth Consultant  
*John Leonetti, George Sandmann*  
Technological Advancements in the Healthcare Industry  
*Healthcare Experts Panel* |
| 5:30–5:45 p.m. | BREAK |
| 5:45–6:35 p.m. | Determining Consequential Damages—Lost Business Value vs. Lost Profits  
*Mark Norris*  
Hypothetically Speaking  
*Bill Ditty*  
Valuation Implications of COVID-19  
*Healthcare Experts Panel* |

Sessions and Presenters subject to change.

For session details and faculty bios, visit BVFLSConference.com
### Wednesday, August 5, 2020

(Additional Registration Fee Required)

**Times shown below are in Eastern time zone.**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30–8:40 a.m.</td>
<td><strong>Welcome!</strong>&lt;br&gt;NACVA Headquarters</td>
</tr>
<tr>
<td>8:40–10:20 a.m.</td>
<td><strong>Industry Standards and Ethics</strong>&lt;br&gt;Mark Kucik, C. Zachary Meyers, Carl Steffen (Additional Registration Fee Required)</td>
</tr>
<tr>
<td>10:20–10:35 a.m.</td>
<td><strong>BREAK</strong></td>
</tr>
<tr>
<td>10:35 a.m.–12:15 p.m.</td>
<td><strong>SESSION TRACKS</strong>&lt;br&gt;Current Update in Valuations (CUV) Symposium (Additional Registration Fee Required)</td>
</tr>
<tr>
<td>12:15–12:30 p.m.</td>
<td><strong>BREAK</strong></td>
</tr>
<tr>
<td>12:30–2:10 p.m.</td>
<td><strong>Current Update in Valuations</strong> (continued)</td>
</tr>
<tr>
<td>2:10–3:10 p.m.</td>
<td><strong>LUNCH BREAK</strong></td>
</tr>
<tr>
<td>3:10–4:50 p.m.</td>
<td><strong>Current Update in Valuations</strong> (continued)</td>
</tr>
<tr>
<td>4:50–5:05 p.m.</td>
<td><strong>BREAK</strong></td>
</tr>
<tr>
<td>5:05–6:45 p.m.</td>
<td><strong>Current Update in Valuations</strong> (continued)</td>
</tr>
</tbody>
</table>

Sessions and Presenters subject to change.

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### Thursday, August 6, 2020

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<table>
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<tr>
<th>Time</th>
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| 8:30–8:40 a.m. | **Welcome!**  
  Conference Chairs/Committee |
| 8:40–9:30 a.m. | *Around the Valuation* World Morning Show  
  *Around the Valuation* World Correspondents |
| 9:30–9:40 a.m. | **BREAK** |
| 9:40–11:20 a.m. | Information Forthcoming |
| 11:20–11:35 a.m. | **BREAK** |
| 11:35 a.m.–1:15 p.m. | SESSION TRACKS  
  **Track One**: Business Valuation and Financial Litigation—How to Do It: From Foundations to Advanced  
  **Track Two**: Lost Profits and the Modern New Business Rule—How it Works and How Defendants Try to Attack It  
  **Track Three**: Current Trends  
  **Track Four** (Co-Sponsored by ValuSource): Databases and Software Tips and Tricks  
  **Session Details**  
  - Litigation Case Study—Explaining and Presenting Your Cost of Capital Estimates  
    By Roger Grabowski  
  - Lost Profits and the Modern New Business Rule—How it Works and How Defendants Try to Attack It  
    By Allyn Needham  
  - Information Forthcoming  
  - Learn to Effectively Use KeyValueData’s 21 Databases to Find the Data You Need, Analyze It, and Incorporate It Into Your Valuation Report  
    By Dave Miles |
| 1:30–2:20 p.m. | **BREAK** |
| 1:30–2:20 p.m. | **Session Details**  
  - Tax Calculations and Adjustments for BV—A Critical Skill for CPAs and Non-CPAs  
    By Chris Hamilton  
  - The Practical Use of Data Analytics in Your Forensics Practice  
    By Rebekah Smith  
  - The Epidemic of Financial Elder Abuse and How We Can Help  
    By Karen Kaseno  
  - Damages Advocate—Creating Better Personal Injury, Wrongful Death, and Employment Law Damage Calculations in Less Time  
    By Jeff Harwell |
| 2:20–3:20 p.m. | **LUNCH BREAK** |
| 3:20–5:00 p.m. | **Session Details**  
  - Advanced Issues Using the Single Period Capitalization of Cash Flow Model  
    By Richard Goeldner  
  - Forensic Asymmetries  
    By Darrell D. Dorrell  
  - ESOP—Disrupting the Exit Strategy Platform  
    By Stephen White  
  - BVM Pro—Using Valuation Software to Perform Better Valuations in Less Time  
    By Dave Miles |
| 5:00–5:15 p.m. | **BREAK** |
| 5:15–6:05 p.m. | **Session Details**  
  - Testing, Validating, and Supporting Company Specific Risk—Do We Have a Philosopher’s Stone?”  
    By Lari Masten  
  - Information Forthcoming  
  - NextGen Practitioners—The Future is Here  
    By Hubert Klein |
| 6:05–6:20 p.m. | **BREAK** |
| 6:20–7:10 p.m. | **Session Details**  
  - Hardball with Hitchner—Solid Answers to Your Tough Questions  
    By Jim Hitchner and Panelists |

*Sessions and Presenters subject to change.*

For session details and faculty bios, visit BVFLSConference.com
## Session Tracks

**Track One**  
Business Valuation and Financial Litigation—How to Do It: From Foundations to Advanced  
11:35 a.m.—1:15 p.m.  
1 Hr CPE  
- Valuation of C Corps and Pass-Through Entities Under the TCJA  
  Daniel Van Vleet  
- Divorce Taxation Including the Impact of the 2017 TCJA  
  Jeff Urbach  
- The Baby Boom Tsunami of Exiting Owners has Reached the Shoreline—How to Position Your Practice to Address the Marketplace Opportunity  
  John Leonetti, Chris Mellen

**Track Two**  
- “Oh, say can you see”—Why Our View from the Weeds, Trees, and Forest can Influence Equity Value Assessment  
  Carl Sheeler  
- Cautionary Tales of Valuation Adjustments and Potential Forensic Implications in Litigation  
  Karolina Calhoun  
- Keeping Up with the Joneses—Jones v. Commissioner: More than Just Tax Affecting  
  Chris Treharne

**Track Three**  
- Using Regression Analysis in the Market Approach (GCTM)  
  Fred Hall  
- Audit Evidence Versus Forensic Evidence  
  Francisco “Frank” Rosillo  
- Angel Eyes—Valuing the Start-Up Company from the Perspective of the Investors  
  Jamison Rounds

**Welcome!**  
Conference Chairs/Committee  
9:40–11:20 a.m.  
2 Hrs CPE  
Vision 2020—The Future of Our Profession and Your Role In It  
Z. Christopher Mercer

**BREAK**  
11:20–11:35 a.m.  
15 Mins

**SESSION TRACKS**  

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<td>5:15–6:05 p.m.</td>
<td>Title Forthcoming</td>
<td>Role of Financial Litigation Consultants in Class Certification</td>
<td>Five Second Impression—Data Visualization for More Effective and Persuasive Reports</td>
</tr>
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<td>7:10 p.m.</td>
<td>Conference Concludes</td>
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