VALUATION

NACVA and the CTI Present the 2017 40 Under Forty Honorees

By Brien Jones, Chief Operations Officer and Executive Vice President of Business Development

Every year, NACVA and the CTI honor young professionals who demonstrate the excellence, superior quality, and the spirit of pioneering so integral to our profession and our organizations. These individuals represent the future visionary leaders from across all spectrums of the accounting and financial consulting professions. They are the best of the best among our group of subject matter experts and leaders.

The Value Examiner is pleased to recognize these professionals for their accomplishments to the profession and their communities, and for their contributions yet to come.

Please visit www.nacva.com/40underforty to view photos and bios of the 2017 Honorees.

Hafiz Imtiaz Ahmad, Abu Dhabi, New York, MBA, MS (Plus), PhD, CVA, MAFF, is serving as assistant professor and director of professional enrichment at the New York Institute of Technology, Abu Dhabi Campus.

Michael Balistreri, New York, NY is a principal and founding member of the North America Debt Finance & Restructuring Group at Canaccord Genuity Inc., a global investment banking firm providing transaction advisory, capital markets, and equity research services.

Anna K. Brewer, Fort Worth, TX is director of Consulting Services at J Taylor, she leverages strong analytical and financial analysis skills in the areas of managed care analysis, negotiation support, valuations, due diligence, physician compensation, joint venture development, and strategic business plans.

Justin Boyd, Charlotte, NC, CFA, ASA, leads the firm-wide International Tax Transfer Pricing Services Practices at Elliott Davis Decosimo, a top thirty accounting firm. He provides business valuation and litigation consulting services to clients throughout the southeast.

Theodore Brown, Atlanta, GA, CVA, MAFF, was named the "New Business Marketer of the Year" in 2015 at his firm. His experience is in bankruptcy, fraud, complex litigation, insurance loss calculations, and business valuations.

Michael Cheng, Norwalk, CT serves as the Private Company Council (PCC) coordinator of the Financial Accounting Standards Board (FASB), where he is responsible for all PCC related matters.

Sok Heang Cheng, Asheville, NC, CPA, CVA, DFF, ABV, is a shareholder at Johnson Price Sprinkle PA (JPS) and provides forensic and valuation services to a variety of clients.

Margaret Christensen, Indianapolis, IN, JD, is a partner at Bingham Greenebaum Doll LLP and a featured speaker at local, state-wide, and national CLE conferences.

Briana Clark, Indianapolis, IN a partner at Bingham Greenebaum Doll LLP and co-chair of the firm's Business Litigation Practice Group, is a Distinguished Fellow of the Indianapolis Bar Foundation.

Scott DeMarco, Albany, NY is a Partner with BST's Valuation, Forensic and Litigation Support Group. He is a recognized expert in hedge fund and private equity valuations for financial consulting and litigation purposes.

Charleen Eckard, Clearwater, FL, CPA, CVA, is a principal at Perzel & Eckard Forensic CPAs, LLC, in Clearwater, FL. She is also currently serving on the Florida Bar's Sixth Circuit Grievance Committee.

Brent Glova, San Diego, CA, CVA, a valuation director at Vantage Point Advisors, Inc., conducts business valuation work for acquisition, divesture, financial reporting, and tax compliance purposes.

Hillary L. Hughes, Cedar Rapids, IA, CFA, is the director of Prairie Capital Advisors Cedar Rapids office, provides strategic insights to assist business owners and board of directors to address long term ownership transition goals by structuring transactions and valuation related to Employee Stock Ownership Plans (ESOPs) on behalf of ESOP trustees as well as business owners.

Will Hamilton, Atlanta, GA, CVA, has made major contributions to the healthcare valuation industry. He is an experienced healthcare consultant, having worked with a wide range of healthcare providers, ACOs, health plans, healthcare information technology companies, and pharmacies.

Stephanie Hyland, Iselin, NJ, ASA, CFE, is a director in the Forensic, Litigation, and Valuation Services Group of EisnerAmper, LLC. With more than sixteen years of experience, Ms. Hyland serves as an expert witness in litigated matters and a trusted financial advisor during settlement negotiations.

Robert Joyce, Milwaukee, Wim MBA, MA, is a founding partner at Bull Moose Financial. He has been instrumental in growing their valuation practice through mentorship and advisory of local entrepreneurs and small businesses. He also assists in business plan development, financial statement analysis, and cash flow planning for clients throughout the U.S.

Alex Kajan, Daytona Beach, FL, ASA, CFA, is a director at Pinnicle Healthcare Consulting, and has completed over 400 business valuations for transaction advisory, litigation, and compliance purposes over the past eight years.

Bharat Kanodia, San Francisco, CA leads private equity and venture valuations, and helps valuation firms optimize their international operations. He has worked with Ipreo, American Appraisal, Veristrat, and Silicon Valley Bank Analytic, where he has valued real estate, industrial, personal property, and financial assets.

Brian M. Karpf, Ft. Lauderdale, FL, JD, is a partner at Young, Berman, Karpf & Gonzalez, PA. He was recently named one of the top 40 lawyers under 40 in Miami by the Cystic Fibrosis Foundation. He was appointed by the president of The Florida Bar to serve on the Family Law Rules Committee.

Melissa Katz, Miami, FL, CPA, CVA, is a driven and highly motivated bilingual young professional who has demonstrated tremendous professional growth and leadership skill. Her accomplishments include receiving a full tuition scholarship for academic achievement while at the University of Miami, a national merit scholar, and a member of the President's Honor Roll.

Kelly Kennedy, Sewickley, PA is an investment advisor and broker with Lincoln Financial Advisors Corporation. She has been awarded the Transition Planner of the Year for the Pittsburgh region by her broker dealer, serves on Lincoln Financials WISE Board within her broker dealer, has been published in industry journals, and is asked to speak at industry events.

Timothy Kinney, Chicago, IL a managing director with Navigant is responsible for strategic direction of the practice, engagement leadership, and human capital management. He has experience in business development, client relationship management, and engagement delivery.

Stephanie Klingzell Carlin, Salina, KS, CPA, CBA, IBA, is an Accredited Senior Appraiser and shareholder of KC&G Business Appraisal Associates, Inc. (KC&G). KC&G is a member of the Financial Consulting Group, the leading organization of business valuation and financial consulting firms in the U.S.

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Jessica Landay, Lakewood, CO, ASA, CVA, is a manager of business valuation and litigation support services at Seigneur Gustafson, where her primary focus is on complex business and intellectual appraisal matters and related litigation services.

Christopher Majdi, Torrance, CA, CVA, CBA, CHBC, is an experienced healthcare valuator and merger and acquisition advisor. He is an executive faculty member at California State University, Long Beach, where he provides instruction in Healthcare Financial Management.

Michael McGinley, Atlanta, GA, CVA, ASA, is a director and shareholder at Prairie Capital Advisors, Inc. He specializes in ownership transition financial advisory services, including: Employee Stock Ownership Plans (ESOPs), mergers and acquisitions, capital raising, and valuation of businesses and business interests for gift and estate tax planning, strategic planning, financial accounting and reporting, buy-sell agreements, and dispute resolution.

James McHugh, Chicago, IL, MBA, is the revenue cycle business unit leader and managing director at Navigant Consulting, Inc. He is responsible for setting the overall strategic vision of the business unit and overseeing business unit operations.

Michael Mensch, Melbourne, FL, CBI, M&AMI, is a managing and founding partner of Agency Brokerage Consultants, a national M&A firm serving the insurance brokerage industry. He leads the firm's valuation and due diligence services.

Jake Morris, Chicago, IL is a managing director with Navigant responsible for Navigant's Revenue Cycle Practice's go-to market strategy and sales management. In addition, he has responsibility for client relationship management and project delivery quality.

Paul Ouweneel, Milwaukee, WI, CPA, specializes in the valuation of businesses and intangible assets as well as sale and purchase transaction support for companies in a variety of industries.

Brooke Pierce, Hattiesburg, MS, CPA, ABV, CVA, ASA, is a senior manager in healthcare services at HORNE LLP. She performs business valuations of medical practices, ambulatory surgery centers, hospitals and other medical facilities. She also works with physicians and hospitals to determine the fair market value of physician/hospital arrangements.

B. Steven Purdy, Rockville, MD, CPA, ABV, is a senior manager in Aronson's Financial Advisory Services Group. He focuses his expertise on valuing privately owned businesses and delivering his independent qualified opinions on highly complex financial dispute matters that require articulate explanation in mediations, negotiations, and the courts of D.C., Maryland, and Virginia.

Rick Shneyder, Milwaukee, WI, MBA, has been instrumental in getting U.S. Bank and Bank of the West to see the value of valuation reports in creating financing packages for doctors and dentists across the country.

Danene Spaeth, Seattle, WA, CPA, ABV, CVA, is a Manager with Strategic Value Group, LLC, an independent financial advisory firm with offices in Los Angeles, Seattle, and Dallas. She has over ten years of valuation and healthcare industry experience assisting clients with mergers, acquisitions, divestitures, joint ventures, tax planning, corporate reorganizations, and financial reporting.

Boris Sobolev, Denver, CO, CPA, CVA, CGMA, is a partner with Cornerstone CPA Group in Denver, CO. Much of his valuation and litigation practice focuses on family law, tracing of assets, due diligence, and valuation for gift and estate tax purposes.

Scott D. Sorrell, Raleigh, NC, CFP, is an Advanced Planning Advisor with Capitol Financial Solutions. He has qualified for the Million Dollar Round Table eleven consecutive years, which statistically includes the top five percent of financial advisors in the world.

Corey Vanderpoel, Milwaukee, WI, BBA, MIS, MBA, is a principal at Schenck M&A Solutions, who brings more than fifteen years of experience as a FINRA registered investment banker who has led more than one hundred M&A transactions.

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Joshua Vannetti, San Diego, CA, CPA, CVA, is currently a manager specializing in litigation support and valuation analysis at Vantage Point Advisors, Inc. in San Diego, California. He has performed damage calculations for disputes involving breach of contract, business interruption, employee dishonesty, and similar matters of economic loss spanning several industries.

Erick Vedasto, Boston, MA, CFA, has developed the valuation models for the business developments teams at American Tower Corporation, a wireless infrastructure company expanding its international presence beyond Mexico, Brazil, and India.

Jason Woon, Seattle, WA, CPA, ABV, is a senior manager in KPMG LLP's valuation practice in Seattle. He values businesses, intangible assets, complex financial instruments, and fixed income securities for financial reporting, tax, and transactional purposes. He is a member of a KPMG LLP's national complex securities valuation practice.

Each of these individuals represent a new and fresh approach to our business. They are ready to build on the foundation that has been laid by previous generations. We welcome them to NACVA and hope that we hear from each of these remarkable individuals at every turn. VE

Brien Jones is a seasoned association executive with extensive professional experience in continuing professional education management, online/distance learning, business development, member recruitment/retention, operations management, conference and event planning, marketing, graphic design, public relations, social media strategies, copywriting, and supporting association governance. He has been employed with the NACVA and the CTI for over twenty years supporting the organizations and their industry partners in a leadership capacity. E-mail: BrienJ1@NACVA.com