



# Association News

Quarterly Newsletter for the National Association of Certified Valuers and Analysts

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### — I Can Feel Changes Comin' On —

—by Alabama

#### A New Year for Change

By Pamela R. Bailey, NACVA's Executive Director, State Chapter Liaison

It's hard to believe another year has come and gone, and the years seem to go a bit faster the older we get (speaking from experience). I hope each of you enjoyed the holidays and are looking forward to a healthy, happy, and prosperous New Year in 2014.

Considering the New Year, I thought Alabama got it right with their lyrics when they sang, "I can feel changes comin' on, people are singin' different songs, and searchin' for a place where they belong." The New Year provides an opportunity to start refreshed and reinvigorated. With that, it appears to be a perfect time to hold an election of new officers for State Chapters, where applicable. There are several Chapters with a president who has held this position for three or more years (some who have held this position since the beginning); if that's the case, it's time to allow another member the *opportunity* to experience all that goes into leading, coordinating, scheduling, and communicating chapter events. In addition, if your chapter has officers, i.e., vice president, treasurer, etc., who have also served for three or more years, they, too, should relinquish their position to allow others the opportunity to contribute and support the State Chapter.

Although we have several presidents/officers doing an exceptional job supporting their chapter, and its members have agreed to keep them on for several years, our State Chapter By-Laws provide for term limits. We need to allow others to share their creativity, ideas, connections, etc., that may not have been shared with the current governance had we not opened the door for this change. The experience of leading a State Chapter as its president holds considerable responsibility, but one that provides potential relationships not found elsewhere, and a position that can then be added to his or her CV.

■ [Outstanding Members](#)

Chris Carnahan  
Curtis Bernstein

■ [New NACVA Members](#)

■ [Newly Credentialed Members](#)

■ [Invitation to 2014 Annual Consultants' Conference](#)

■ [Free Webcast on New Cost of Capital Data Sources—2014 Valuation Handbook](#)

My hope is to see State Chapters attract more of the newly certified members to Chapter events by pursuing creative types of promotion, such as extending invitations to a wider audience beyond our membership, asking each member to bring another member at 50% discount off the registration fee, or by bringing an attorney for free, etc. You should be discussing new ways to generate attendance and build on what has been successful. Contact me at HQ and let me assist your Chapter and offer some ideas. One thing HQ offers that you may not be aware of is several topics/presenters available to any Chapter that's interested, such as:

1. Dave Miles—Rethinking Your Position on Valuation Software (ValuSource) (Video Conference)
2. Bring in Howard Lewis as he heads up his panel of the Four Top Former IRS Valuation Program Senior Managers
3. Once a month (generally on the third Monday), is a live online webcast—*Around the Valuation World™ in 90 Minutes*. We know how busy you are and how difficult it must be to stay on top of all the updates and changes in the profession. To support you, we have assembled a team of industry experts who are covering the profession's leading publications and delivering online in ninety minutes all you need to know so at all times, you can be confident that your knowledge is current and accurate as you navigate "Around the Valuation World!"  
Times: 10:00 a.m.–11:30 a.m. PT/11:00 a.m.–12:30 p.m. MT/12:00 p.m.–1:30 p.m. CT/1:00 p.m.–2:30 p.m. ET
4. Consider any webinar we offer and schedule a meeting around that date/time. [Click here to see a list of current webinars.](#)

### A Not-to-Be-Missed Opportunity

If you missed the flyer or HTML, don't miss out on hearing from two of our longtime Business Valuation and Forensic Litigation Service (BVFLS) practitioner/members: Mel Abraham, CPA, CVA, ABV, ASA, and Rod Burkert, CPA/ABV, CVA, MBA, who are leading the way in supporting those who want/need help in growing their business/practice with their latest program—**Practice Builder Academy (PBA)**. Hit a homerun with your members and invite Rod or Mel to be a guest speaker at a State Chapter meeting in 2014. Either could provide a live presentation or webinar. Here are a few takeaways from their program:

- *Position yourself as **THE** expert in your field*
- *Efficiently grow your practice*
- *Command higher fees*
- *Target and market to higher paying clients*
- *Streamline your practice to take up less of your time*
- *Spend less time working and more time doing what you enjoy*



#### Mel Abraham

Mel is an entrepreneur, acclaimed speaker, mentor, advisor, author and Founder of Business Breakthrough Academy & Thoughtpreneur Academy as well as the creator of the 9 Ideals of Legacy Framework teaching to DESIGN a business, CREATE a life and LIVE a legacy.



#### Rod Burkert

Rod is the founder of Burkert Valuation Advisors, LLC. Rod leverages social media to build a mobile consulting practice, which allows him to travel full time in an RV throughout the United States and Canada with his wife and two dogs.

If you would like additional details about this program [click here.](#)

### State Chapter Initiatives

We will be scheduling our annual planning meeting (conference call) soon with Chapter presidents to determine the topics for our tri-annual agendas for 2014. The dates have been set as follows:

Friday, July 18  
Friday, September 12

Friday, November 7

We will be looking for **volunteers to submit/develop presentations with speaker notes** for each of the topics that will be presented at these meetings, and we will **need three new cases** for Case Analysis in Person (CAP), so we can offer this program at each meeting should a Chapter choose to do so. Whether your members need Case Analysis for recertification or not, it is an excellent opportunity to participate in the exercise of analyzing and discussing a valuation report. Keep in mind, those individuals who don't need recertification credit do not have to pay the \$175 administration fee or complete a Conclusions and Recommendations Report (CAR). However, all attendees receive CPE credit as long as they have pre-read the case and actively participate in the discussion.

As a follow-up to my last article when I introduced you to **MemberPlanet**, a new online communication tool the Chapters may want to consider using when planning future meetings, Jeff Harwell, Texas State Chapter President sent out his meeting announcement via MemberPlanet (HTML), which provided his members with all the pertinent details for his upcoming meeting/speakers/topics, etc. In addition, it included a link to an online registration form that allowed his members to register for Case Analysis (separately) and pay the registration fee for the meeting separately; in addition, members could select their form of payment via credit card or e-check. What's more important is that this is a secure site for processing payments and is meant to make it *easier for our members* who want to take advantage of this opportunity. Those of you interested in learning more about the advantages available to members can visit the website at <https://www.memberplanet.com>

### **News You Can Use**

Did you read the CEO's Message from the last issue of the *Association News*? It included valuable information that bears repeating and should be discussed with the members in your Chapter. Specifically, please note where our CEO states that, "NACVA's Certified Valuation Analyst® (CVA®) credential is accredited by the National Commission for Certifying Agencies® (NCCA®), a division of the Institute for Credentialing Excellence™ (ICE™)." He explains the tremendous amount of time and effort we put in over a seven-year period to earn this prestigious credential. Click on the following link to read more:

[Fourth Quarter 2013 CEO's Message: What NCCA-CVA Accredited Means for You](#)

If you have any question, the staff at HQ is available between 8:00 a.m. and 6:00 p.m. (MT) Monday–Friday; call (800) 677-2009.

Headquarters has added valuable assistance to those needing help in completing their Recertification Reporting Form. We added a Frequently Asked Questions document that includes 34 of the most often asked questions from members who call NACVA's Recertification Specialist, asking, "How do I fill out my Recertification Reporting Form?" Consider clicking on the following link before calling: [\*\*NACVA Recertification Frequently Asked Questions \(FAQs\)\*\*](#).

I look forward to talking with each of you and hearing what's going on in your Chapter. Share your success stories with others so we can all benefit from your experience. Thank you for your continued support of NACVA's State Chapter Foundation.

Local state chapter events provide members valuable opportunities to: (1) promote CVAs, MAFFs, ABARs and NACVA/CTI within the community, (2) create a platform to network and develop mentoring relationships with other members, (3) deliver relevant, industry-related information and educate members on the range of support services available as benefits of membership and, (4) receive economical CPE on timely and relevant topics pertinent to valuation and litigation forensic services.


I encourage NACVA members to take advantage of these opportunities, share ideas, and educate one another on current issues facing the business valuation, litigation, financial forensics/fraud consulting, and mergers and acquisitions communities. To help facilitate and address such issues, NACVA provides presentation materials for three half-day State Chapter meetings each year on topics of current interest.

Contact your local State Chapter president to let him or her know of your interest in attending a meeting, being a presenter, or assisting in preparing the materials for a future meeting—or contact NACVA's Executive Director, Pam Bailey at [PamB1@NACVA.com](mailto:PamB1@NACVA.com). If you are interested in becoming an officer of a State Chapter start-up (for a state that has no Chapter), please contact me to discuss the process and responsibilities should you be accepted as an officer of a Chapter needing leadership.

I wish everyone a healthy, happy, and prosperous New Year!

Thank you.



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