



State Chapters Holding Meetings in 2015/2016

— All Visitors Welcome to Attend —

AGENDAS SORTED BY DATE

KENTUCKY—Meeting will be held at the Hurstbourne Country Club, 9000 Hurstbourne Club Lane, Louisville, KY 40222. Meeting starts at 8:00am to 12:00pm. Registration Fee is \$150 payable to the Kentucky State Chapter of NACVA (4 Hours CPE)	Bill Wingate State Chapter President Contact Bill at: (502) 494-0852 or at: bill@wingate.us	THURSDAY—JULY 16, 2015—Guest Speakers will be Mel Abraham and Rod Burkert leading experts in growing your business, will present their “Practice Builder Academy.”
INDIANA—Meeting will be held at the Indiana Wesleyan North Indianapolis Facility, Building is located at 3777 Priority Way South Drive (see email for directions). Sign-in starts at 10:00am—Seminar starts at 10:15am to 4:15pm (Lunch included). Registration Fee is \$95 payable to the NACVA Indiana State Chapter (6 Hours CPE)	Paul Wonch State Chapter President Contact Paul at: (317) 347-5200 Ext: 1267 or at: PWonch@KBParrish.com	FRIDAY—JULY 17, 2015—Guest Speakers will be Mel Abraham and Rod Burkert leading experts in business valuation and growing your practice, will introduce you to their “Practice Builder Academy.”
MASSACHUSETTS—A Half-Day Seminar at the DoubleTree Hotel, 5400 Computer Drive in Westborough (See email for driving directions or call Joan Peterson) (Continental Breakfast at 7:30am—Seminar starts at 8:00am to 12:00pm Noon) (4 Hours CPE)—Registration Fee is \$95 payable to the NACVA MA Chapter and send it to Joan.	Nell Usta State Chapter President Contact Joan Peterson at: (413) 563-7057 or at: nacva_machapter@dejazzd.com	THURSDAY—JULY 23, 2015—Guest Speaker and Topics—Mel Abraham will share his “Strategies to Grow Your Practice in Today’s Economy.”
MISSISSIPPI—Meeting will be held in Ridgeland, MS. All participants will be charged a fee of \$25 for the report. Members needing Registration credit will need to pay an Admin Fee of \$150 payable to NACVA, all others may participate to earn CPE credit (2 Hours CPE) without paying the additional \$150 fee.	Rob King State Chapter President Contact Rob at: (601) 583-1000 or at: rking@koerbercompany.com	FRIDAY—AUGUST 21, 2015—Case Analysis in Person (CAP) will be included. Those participating in the CAP session must pre-read the case prior to the meeting.
OHIO / SOUTH—Meeting starts at 8:00am to 2:00pm. (5 Hours CPE)—held at the Worthington Hills Country Club. Registration Fee is \$80, includes Coffee, Refreshments and Lunch. Members needing Recertification credit will need to pay an Admin Fee of \$150 to NACVA, all other attendees may participate to earn CPE credit without paying the \$150 fee.	Bill Ditty State Chapter President Contact Bill at: (614) 793-1112 or at: bditty@dittyfinancial.com	WEDNESDAY—AUGUST 26, 2015—Topics include: TBD. In addition, a Case Analysis in Person (CAP) will be included. Those participating in the CAP session must pre-read the case prior to the meeting.

CHAPTER MEETINGS/EVENTS—CONSIDER: PITTSBURGH CTI—SEPTEMBER 14–16, 2015

NEW YORK / UP STATE—Meeting will be held at The Bonadio Group (Buffalo), 100 Corporate Parkway, Suite 200, Amherst, NY 14226, (716) 250-6600. Check-in and Breakfast starts at 8:30am, Meeting starts at 9:15am to 3:15pm (includes lunch). Registration Fee \$187. Members needing Recertification credit will need to pay an Admin Fee of \$150 to NACVA, all other attendees may participate to earn CPE credit without paying the \$150 fee. All participants must pre-read the case.	Deb Lemke State Chapter President Contact Deb at: (585) 546-5660 or at: deb@gfsf-rochester.com	TUESDAY—SEPTEMBER 15, 2015—Live Broadcast from Pittsburgh, PA, Guest Speakers: Mark Walker will discuss “Linking the Market Approach to the Income Approach,” Lorenzo Carver presents “Using Market Data in your Valuation Reports,” followed by a Case Analysis in Person (CAP) program.
TEXAS—CENTRAL—Meeting/Event will be held at Per Stirling Capital Management, 4800 Bee Cave Rd, 2nd Floor, West Lake Hills, TX., (512) 628-2300. Check-in/Coffee at 9:30am to 2:30pm. Registration Fee (includes lunch) \$200, includes Case Analysis for CPE credit. If you also need Recertification credit an Admin Fee of \$150 is payable to NACVA, everyone must pre-read the case prior to the meeting to participate in CAP.	Noel Stout State Chapter President Contact Noel at: (512) 474-5288 or at: nstout@stout-associates.com	WEDNESDAY—SEPTEMBER 16, 2015—Live Broadcast from Pittsburgh, PA with Presenter Sarah von Helfenstein on “Common Sense Approach to S Corp Value Questions,” and “Conversation with the Masters Panel Discussion on BV Topics” with Peter Agrapides, Melissa Bizyak, Bob Dohmeyer, Lari Master, Marc Vianello, and Sarah von Helfenstein.
MARYLAND / WASHINGTON DC—Meeting will be held at the Columbia DoubleTree, 5485 Twin Knolls Rd, Columbia, MD 21045, (410) 997-1060. Breakfast at 7:30am, Seminar begins at 8:00am to 12:00pm, followed by Case Analysis (CAP) from 12:00pm to 1:00pm. Registration Fee \$95, if including CAP, an additional fee of \$25 for CPE credit, if you need Recertification credit an Admin Fee of \$150 is payable to NACVA, and must pre-read the case prior to the meeting.	Greg Caruso State Chapter President Contact Greg at: (410) 507-5441 or at: gcaruso@harvestbusiness.com	FRIDAY—SEPTEMBER 18, 2015—Guest Speakers: Theresa Higgins & Brooke Tucker are presenting “Hot Topics in ESOPs Valuations,” and Paul Weinblatt will present “Reconciling Differing Approaches/Methods,” followed by a Case Analysis in Person (CAP).

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— Continued —

VIRGINIA—Meeting will be held at The Place in Innsbrook, 4036-C Cox Road, Glen Allen, VA 23060, 8004-346-2100, info@theplaceatinnbrook.com. Breakfast at 8:30 to 9:15am. Presentation starts at 9:15 to 4:30pm. Registration Fee \$150 includes lunch. If you need Recertification credit an Admin Fee of \$150 is payable to NACVA, and all participants must pre-read the case prior to the meeting to receive CPE credit.	Dean Heinberg State Chapter President Contact Dean at: (804) 864-3663 or at: deanh@valuationone.net	WEDNESDAY—SEPTEMBER 16, 2015—Live Broadcast from Pittsburgh, PA with Guest Speakers: Lari Masten "What's That Mean? Five Principles to Avoid Overvaluing a Company," Peter Agrapides "Federal and State Case Law Update," a Group Roundtable Discussion, followed by a Case Analysis in Person (CAP).
INDIANA—Meeting will be held at the Indiana Wesleyan University—Fort Wayne Education & Conference Center, 8211 West Jefferson Blvd (see email for directions), 866-248-2435. Sign-in starts at 10:00am—Meeting starts at 10:30am to 3:45pm (Lunch included). Registration Fee is \$75 payable to the NACVA Indiana State Chapter (5 Hours CPE). If you need Recertification credit an Admin Fee of \$150 is payable to NACVA, and must pre-read the case prior to the meeting.	Paul Wonch State Chapter President Contact Paul at: (317) 347-5200 Ext: 1267 or at: PWonch@KBParish.com	FRIDAY—SEPTEMBER 25, 2015—Guest Speakers will be bankers that will discuss "SBA Loans: 7A and 504 programs," plus highlights from the "Indiana CPA Society's BV Conference," followed by a Case Analysis in Person (CAP) program, led by Lisa Isenbarger.
OHIO / SOUTH—Meeting will be held at the Worthington Hills Country Club, 920 Clubview Blvd S., Columbus, OH 43235, 614-885-9516. Check-in and Breakfast at 8:30am. Seminar starts at 9:00am to 1:00pm (includes Lunch). Registration Fee is \$50. Members needing Recertification credit will need to pay an Admin Fee of \$150 to NACVA, all other attendees may participate to earn CPE credit for \$25.	Bill Ditty State Chapter President Contact Bill at: (614) 446-1112 or at: bditty@dittyfinancial.com	FRIDAY—SEPTEMBER 25, 2015—Topics include: Avoiding Conflicts of Interest and Professional Ethics Violations in Matrimonial Business Valuation Litigation, followed by a Case Analysis in Person (CAP) program. Those participating in the CAP session must pre-read the case prior to the meeting.
CHAPTER MEETINGS/EVENTS—CONSIDER: HOUSTON CTI—OCTOBER 18–20, 2015		
OHIO / NORTH—Meeting will be held at the Crowne Plaza, 7320 Engle Road, Middleburg Heights, OH 44130, 440-243-4040. Check-in at 7:45am. Seminar begins at 8:00am to 12:30pm CAP (includes Lunch). Registration Fee is \$25. Members needing Recertification credit will need to pay an Admin Fee of \$150 to NACVA, all other attendees may participate to earn CPE credit for \$25.	John Davis State Chapter President Contact John at: (440) 887-9150 or at: john@daviscpas.net	FRIDAY—OCTOBER 2, 2015—Topics include: "The Misuse & Abuse of Guideline Company Transactional Data in Valuing a Business Using the Market Approach," and "Dealing with Interest Bearing Debt in Valuations," followed by a Case Analysis in Person (CAP) program. Those participating in the CAP session must pre-read the case prior to the meeting.
WASHINGTON—Meeting will be held in the Wenatchee Area from 9:00am to 12:00pm.	Roberto Castro State Chapter President Contact Roberto at: (801) 953-3675 or at: Roberto.Castro@wasatchbusval.com	FRIDAY—OCTOBER 2, 2015—Guest Speakers and Topics Coming Soon. CANCELED!
ALASKA—Meeting will be held at Forensic & Valuation Services, 1407 West 31st Avenue, Suite 500, Anchorage, AK 99503, from 11:30am to 1:25pm. Registration Fee: \$75 for 2 hours of CPE. (no additional cost)	Suzanne Trimble State Chapter President Contact Suzanne at: (907) 272-6522 or at: sue@smtcpa.com	WEDNESDAY—OCTOBER 19, 2015—Topic: CPA Malpractice Cases—Understanding and Preparing as an Expert for the Plaintiffs/Defendants: A Study of Contrasts (Live Broadcast from Houston, TX) with Craig Greene. CANCELED!
WASHINGTON—Meeting will be held in the Tacoma, Washington area.	Roberto Castro State Chapter President Contact Roberto at: (801) 953-3675 or at: Roberto.Castro@wasatchbusval.com	WEDNESDAY—OCTOBER 19, 2015—Guest Speakers and Topics Coming Soon (Live Broadcast from Houston, TX) and more. CANCELED!
COLORADO—Meeting will be held at the Columbine Country Club, 17 Fairway Lane, Littleton, CO 80123, 303-794-2674. From 8:00am to 5:00pm (Lunch included). Registration Fee is \$110.	Sarah Spelts Loeb State Chapter President Contact Sarah at: (317) 347-5200 or at: cownacva@gmail.com	THURSDAY—OCTOBER 22, 2015—Guest Speakers will be Keith Sellers who will present the "Effect of Tax Policy on Value in the Private Capital Markets," and Michael Gregory will present on "DOLM and the IRS and How the IRS Determines Reasonable Compensation."

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— Continued —

FLORIDA—WEST—Meeting/Event will be held at FAU Ft. Lauderdale Campus, 111 E Las Olas Blvd., Ft Lauderdale, FL 33301. Starts at 9:30am to 4:30pm. Registration Fee \$175 includes lunch. Make checks payable to NACVA SWFL Chapter, mail to Trisch Garthoeffner, 3458 Bravada Way, Naples, FL 34119. http://www.fau.edu/facilities/osua/maps/FortLauderdaleMap.pdf	Trisch Garthoeffner State Chapter President Contact Trisch at: (239) 324-0611 or at: Trisch@anchorbvfs.com	FRIDAY & SATURDAY—OCTOBER 23 & 24, 2015—Guest Speakers from the Family Law Collaborative Law Group—Presentation on “Paradigm Shift of the Collaborative Law Process and the Use of Valuation and Forensic Experts,” Howard Lewis—“Achieving Valuation Firm Excellence,” Geri Armalavage—“Real Estate Appraisal Work and How it Applies to Valuation Experts,” Frank Rosillo recent presentation topic.
MASSACHUSETTS—A Full-Day Seminar being held at the DoubleTree Westborough, 1500 Computer Drive, (508) 366-5511. 8:00am to 5:00pm. (Breakfast at 7:30am) Registration Fee is \$275 (8 hours CPE) payable to the NACVA MA Chapter and send it to Joan. If you have not attended a MA Chapter in the past two years Registration Fee is \$250.	Nell Usta State Chapter President Contact Joan Peterson at: (413) 563-7057 or at: nacva_machapter@dejazzd.com	THURSDAY—OCTOBER 29, 2015—Guest Speaker Darrell Dorrell of Financial Forensics will deliver a full day presentation on “Using Financial Forensics in Valuations.”
GEORGIA—Meeting will be held at a location TBD. Additional details forthcoming—the meeting may include a Case Analysis in Person (CAP) program.	Adrian Loud State Chapter President Contact Adrian at: (404) 334-7020 or at: arloud@censeoadvisors.com	THURSDAY—OCTOBER 29, 2015—Guest Speakers and Topics Coming Soon (Live Broadcast from San Diego, CA) and more. SAVE THE DATE!
MARYLAND / WASHINGTON DC—Meeting will be held at the Columbia DoubleTree, 5485 Twin Knolls Rd, Columbia, MD 21045, (410) 997-1060. Breakfast at 7:30am, Seminar begins at 8:00am to 12:00pm, followed by Case Analysis (CAP) from 12:00pm to 1:00pm. Registration Fee \$95, if including CAP, and additional fee of \$25 for CPE credit, if you need Recertification credit an Admin Fee of \$150 is payable to NACVA, and must pre-read the case prior to the meeting.	Greg Caruso State Chapter President Contact Greg at: (410) 507-5441 or at: gcaruso@harvestbusiness.com	FRIDAY—OCTOBER 30, 2015—Guest Speakers: David DeJong will speak on “Marketability Discounts,” followed by Greg Caruso who will discuss the “Legal Considerations of Valuing a Privately Held Firm,” followed by a Case Analysis in Person (CAP).
OHIO / SOUTH—Meeting starts at 7:30am to 1:00pm. (6 Hours CPE)—held at the Worthington Hills Country Club, 920 Clubview Drive South, Columbus, OH 43221. Registration Fee is \$50, plus \$25 for the presentation, includes Coffee, Refreshments and Lunch. If including CAP, an additional fee of \$25 for CPE credit, if you need Recertification credit an Admin Fee of \$150 is payable to NACVA, all must pre-read the case prior to the meeting.	Bill Ditty State Chapter President Contact Bill at: (614) 446-1112 or at: bditty@dittyfinancial.com	FRIDAY—OCTOBER 30, 2015—Topics include: “25 Ways to Make Your Business Valuation Stand Up in Cross Examination.” In addition, Case Analysis in Person (CAP) will be included. Those participating in the CAP session must pre-read the case prior to the meeting.
WISCONSIN—Meeting will be held at a location TBD. Additional details forthcoming—the meeting will include a Case Analysis in Person (CAP) program.	Gaylene Stingl State Chapter President Contact Gaylene at: (262) 923-5186 or at: stinglg61@gmail.com	MONDAY—NOVEMBER 16, 2015—Guest Speakers and Topics Coming Soon (Live Broadcast from San Diego) and more. SAVE THE DATE!
NEW YORK / UP STATE—Meeting will be held at Mengel Metzger Barr, 100 Chestnut Street, Suite 1200, Rochester, NY 14604 (585) 423-1860. Starts at 8:30am to 9:00am Continental Breakfast & Networking. Registration Fee \$12 (Lunch included). 9:00am to 5:15pm includes CAP, \$220 for 8 hours of CPE credit, if you need Recertification credit an Admin Fee of \$150 is payable to NACVA, all attending CAP must pre-read the case prior to the meeting.	Deb Lemke State Chapter President Contact Deb at: (585) 546-5660 or at: deb@gfsf-rochester.com	TUESDAY—NOVEMBER 17, 2015—Webinar on “Business Interruption-Understanding the Unique Issues of BI Damage Calculation & Developing a Niche Practice,” Live Broadcast—“Unlocking Private Company Wealth” by Chris Mercer, Live Broadcast—“Transition Planning: The Good, the Bad, and the Ugly” by Steve Egna, and Case Analysis in Person (CAP).
ALASKA—Meeting will be held at Forensic & Valuation Services, 1407 West 31st Avenue, Suite 500, Anchorage, AK 99503, from 11:30am to 1:25pm. Registration Fee: \$75 for 2 hours of CPE. (no additional cost)	Suzanne Trimble State Chapter President Contact Suzanne at: (907) 272-6522 or at: sue@smtcpa.com	WEDNESDAY—NOVEMBER 18, 2015—Topic: How to Structure the Sale of a Business (Live Broadcast from San Diego, CA) with Brian Davidson.

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NEBRASKA—Meeting will be held at Mahoney State Park, 28500 West Park Hwy, Ashland, NE 68003, from 8:00am to 3:30pm and CAP from 3:30 to 5:00pm. Registration Fee: \$25 8 hours of CPE for \$25, CAP another 2 hours of CPE \$25. (additional fee for Recertification Credit, \$150). must pre-read the case prior to the meeting if participating in CAP.	Joan Buchman State Chapter President Contact Joan at: (402) 721-7662 or at: shnjoanb@qwestoffice.net	WEDNESDAY—NOVEMBER 18, 2015—Topic: Review of Current Updates, Analysis of Relevant Court Cases, Common Errors in Valuation, Cost of Capital and Market Method, Plus Case Analysis in Person—Buy/Sell Agreement.
WASHINGTON—Meeting will be held at the Pacific Lutheran University, 12180 Park Ave S, Tacoma, WA 98447 (253) 535-7411.	Roberto Castro State Chapter President Contact Roberto at: (801) 953-3675 or at: Roberto.Castro@wasatchbusval.com	WEDNESDAY—NOVEMBER 18, 2015— HAS BEEN CANCELED!
CHAPTER MEETINGS/EVENTS—CONSIDER: SAN DIEGO CTI—DECEMBER 16–18, 2015		
MARYLAND / WASHINGTON DC—Meeting will be held at the Columbia DoubleTree, 5485 Twin Knolls Rd, Columbia, MD 21045, (410) 997-1060. Breakfast at 7:30am, Seminar begins at 8:00am to 12:00pm, followed by Case Analysis (CAP) from 12:00pm to 1:00pm. Registration Fee \$95, if including CAP, and additional fee of \$25 for CPE credit, if you need Recertification credit an Admin Fee of \$150 is payable to NACVA, and must pre-read the case prior to the meeting.	Greg Caruso State Chapter President Contact Greg at: (410) 507-5441 or at: gcaruso@harvestbusiness.com	FRIDAY—DECEMBER 4, 2015—Guest Speakers: Alan Zipp and Cheryl Hyder will discuss “Exploring Professional, Personal and Enterprise Goodwill in a Dissolution of Marriage,” followed by Achille Ekeu will speak on the topic of “Using Social Media to Build Your Practice,” followed by a Case Analysis in Person (CAP).
MINNESOTA—Meeting will be held at the Crown Plaza Minnesota West, 3131 Campus Drive, Plymouth, MN 55441 (763) 559-6600. Continental Breakfast and Registration at 8:00am, Meeting starts at 8:30am to 4:30pm. 8 hours of CPE will also include a Lunch Buffet. Registration Fee \$195. Contact Julie Laven with questions and/or directions at (952) 544-1212.	Rick Berning State Chapter President Contact Rick at: (952) 544-1212 or at: rick@bhexperts.com	FRIDAY—DECEMBER 4, 2015—Guest Speakers and Topics: “Building a Practice in Today’s Economy,” with Rod Burkert & Mel Abraham, “Transfer Pricing & Valuing Subsidiaries of International Entities & Global Intangibles,” by Guy Sanschagrin & Nancy Voth, and “How the IRS Values Non-Controlling Interests in S-Corps with Job Aid Commentary by the Original Champion,” with Michael Gregory.
NEW YORK / UP STATE—Meeting will be held in Syracuse.	Deb Lemke State Chapter President Contact Deb at: (585) 546-5660 or at: deb@gfsf-rochester.com	TUESDAY—DECEMBER 8, 2015—Guest Speakers and Topics Coming Soon. SAVE THE DATE!
WASHINGTON—Meeting will be Hosted by Equilus Financial Services, and Central Washington Appraisal, Economics & Forensics at 5 South Wenatchee Avenue, Suite 210, in Wenatchee, WA. Start time 8:00am with Case Analysis in Person (CAP) ending with Networking at 5:00pm. Registration will include Continental Breakfast and Lunch.	Roberto Castro State Chapter President Contact Roberto at: (801) 953-3675 or at: Roberto.Castro@wasatchbusval.com	TUESDAY—DECEMBER 8, 2015—“Valuation and Forensic Issues in Corporate Divorce Action,” by Hubert Klein, “Case Law Update, Business Valuation Disputes and Leading US Tax Court Cases,” and “Hands on Works for Starting and Completing a Personal Injury Economic Damages Analysis,” by Robert Vance.
ALASKA—Meeting will be held at Forensic & Valuation Services, 1407 West 31st Avenue, Suite 500, Anchorage, AK 99503, from 11:30am to 1:25pm. Registration Fee: \$75 for 2 hours of CPE. (no additional cost)	Suzanne Trimble State Chapter President Contact Suzanne at: (907) 272-6522 or at: sue@smtcpa.com	WEDNESDAY—DECEMBER 9, 2015—Topic: Litigation-based Valuations (Live Broadcast from Ft. Lauderdale, FL) with Frank Rosillo, Sr.
CHAPTER MEETINGS/EVENTS—JANUARY 2016		
MASSACHUSETTS—A Half-Day Seminar being held at the DoubleTree Westborough, 1500 Computer Drive, (508) 366-5511. (Continental Breakfast at 7:30am—Seminar starts at 8:00am to 12:00pm Noon) (4 Hours CPE)—Registration Fee is \$95 payable to the NACVA MA Chapter and send it to Joan.	Nell Usta State Chapter President Contact Joan Peterson at: (413) 563-7057 or at: nacva_machapter@dejazzd.com	THURSDAY—JANUARY 21, 2016—Guest Speakers and Topics Forthcoming. SAVE THE DATE!