

# Wednesday, September 10, 2025

Wednesday courses are not included with Conference Registration. These courses require an additional Registration Fee to attend.

6:00–8:30 a.m. MT	Registration and Continental Breakfast	
5:30–7:10 a.m. PT 6:30–8:10 a.m. MT 7:30–9:10 a.m. CT 8:30–10:10 a.m. ET 2 Hrs CPE	Industry Standards and Ethics Course <i>not</i> included with Conference Registration. Requires additional Registration Fee to attend.	Business Valuation Report Peer Review: Case Analysis In-Person CAP Course <i>not</i> included with Conference Registration. Requires additional Registration Fee to attend.
8:10–8:30 a.m. MT	BREAK 20 Minutes	
	Current Update in Valuations Course <i>not</i> included with Conference Registration. Requires additional Registration Fee to attend.	
7:30–9:10 a.m. PT 8:30–10:10 a.m. MT 9:30–11:10 a.m. CT 10:30–12:10 p.m. ET 2 Hrs CPE	Current Update in Valuations Session <i>not</i> included with Conference Registration. Requires additional Registration Fee to attend.	
10:10–10:30 a.m. MT	Break 20 Minutes	
9:30–11:10 a.m. PT 10:30–12:10 p.m. MT 11:30–1:10 p.m. CT 12:30–2:10 p.m. ET 2 Hrs CPE	Current Update in Valuations (continued) Session <i>not</i> included with Conference Registration. Requires additional Registration Fee to attend.	
12:10–1:10 p.m. MT	Lunch Break 1 hour ( <i>lunch on own</i> )	
12:10–1:50 p.m. PT 1:10–2:50 p.m. MT 2:10–3:50 p.m. CT 3:10–4:50 p.m. ET 2 Hrs CPE	Current Update in Valuations (continued) Session <i>not</i> included with Conference Registration. Requires additional Registration Fee to attend.	
2:50–3:10 p.m. MT	Break 20 Minutes	
2:10–3:50 p.m. PT 3:10–4:50 p.m. MT 4:10–5:50 p.m. CT 5:10–6:50 p.m. ET 2 Hrs CPE	Current Update in Valuations (continued) Session <i>not</i> included with Conference Registration. Requires additional Registration Fee to attend.	

Sessions, Delivery Method, and Presenters subject to change.

# Thursday, September 11, 2025

All Sessions will be Hybrid: In-Person and Virtual.

Business Valuation

Healthcare

Exit Planning/Mergers & Acquisitions

Current Trends

Financial Litigation/Expert Witness

Practice Management

Specialty Applications

6:30–8:00 a.m. MT	Registration, Continental Breakfast, and Exhibits			
6:00–6:50 a.m. PT 7:00–7:50 a.m. MT 8:00–8:50 a.m. CT 9:00–9:50 a.m. ET 1 Hr CPE	Around the Valuation World Morning Show Around the Valuation World Correspondents			
7:50–8:10 a.m. MT	Break 20 Minutes			
7:10–8:00 a.m. PT 8:10–9:00 a.m. MT 9:10–10:00 a.m. CT 10:10–11:00 a.m. ET 1 Hr CPE	State of the Profession Chris Mercer			
9:00–9:20 a.m. MT	Break 20 Minutes			
	Track One	Track Two	Track Three	Track Four
8:20–10:00 a.m. PT 9:20–11:00 a.m. MT 10:20–12:00 p.m. CT 11:20–1:00 p.m. ET 2 Hrs CPE	<div></div> <div>Myth Busting DLOM Measures Ashok Abbott</div>	<div></div> <div>Title Forthcoming Michael Kaplan, Judge Yates, Judge Platt, Judge Driscoll</div>	<div></div> <div>A Year After U.S. Elections: Impact on Global Economy and Markets Carla Nunes, James Harrington</div>	<div></div> <div>From Numbers to Narratives: Mastering the Art of the Valuation Report Richard Gray, Pasquale Rafanelli</div>
11:00–11:20 a.m. MT	Break 20 Minutes			
10:20–11:10 a.m. PT 11:20–12:10 p.m. MT 12:20–1:10 p.m. CT 1:20–2:10 p.m. ET 1 Hr CPE	<div></div> <div>What You Need to Know About Becoming or Working with a Court-Appointed Neutral Michael Kaplan, Merrill Hirsh</div>	<div></div> <div>Engagement Letters Can Make or Break You: Make Sure You Get it Right! Glenn Block, Greg Clark</div>	<div></div> <div>Cover Your Assets Jeffrey Harwell</div>	<div></div> <div>Through the Looking Glass: When Cash Goes Crypto James Spencer, Brad Sargent</div>
12:10–1:00 p.m. MT	Lunch 50 Minutes			
12:00–1:40 p.m. PT 1:00–2:40 p.m. MT 2:00–3:40 p.m. CT 3:00–4:40 p.m. ET 2 Hrs CPE	<div></div> <div>AI Infusion to Valuation Models for High-Risk Single Product Firms Alan Gorlick</div>	<div></div> <div>Truth on Paper: Evaluating Client Representations in Expert Work Michael Pakter</div>	<div></div> <div>IRS Magnets in Business Valuations Bruce Wood</div>	<div></div> <div>Create and Maintain a Positive Culture Robert Carter, Samantha Fisher</div>
2:40–3:00 p.m. MT	Break 20 Minutes			
2:00–3:40 p.m. PT 3:00–4:40 p.m. MT 4:00–5:40 p.m. CT 5:00–6:40 p.m. ET 2 Hrs CPE	<div></div> <div>If You Want to Practice Business Valuation, You Have to Peel the Onion Jeffrey Harwell</div>	<div></div> <div>Beliefs, Behavior, and Fraud in Valuations Dr. Sri Ramamoorti</div>	<div></div> <div>Valuation Issues in M&amp;A: Standards, Accounting, and Due Diligence Kent Pummel</div>	<div></div> <div>Getting Personal with Personal Goodwill Karolina Calhoun, David Harkins</div>
4:40–5:00 p.m. MT	Break 20 Minutes			
4:00–4:50 p.m. PT 5:00–5:50 p.m. MT 6:00–6:50 p.m. CT 7:00–7:50 p.m. ET 1 Hr CPE	The Momentum Mindset: A Business Development Blueprint for Financial Professionals Greg Chambers			
6:00–7:00 p.m. MT	Networking Reception			

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# Friday, September 12, 2025

All Sessions will be Hybrid: In-Person and Virtual.

 Business Valuation

 Exit Planning/Mergers & Acquisitions

















 Financial Litigation/Expert Witness

 Specialty Applications

 Healthcare

 Current Trends

 Practice Management

6:30–8:00 a.m. MT	Continental Breakfast and Exhibits			
6:00–6:50 a.m. PT 7:00–7:50 a.m. MT 8:00–8:50 a.m. CT 9:00–9:50 a.m. ET 1 Hr CPE	Around the Valuation World Morning Show Around the Valuation World Correspondents			
7:50–8:10 a.m. MT	Break 20 Minutes			
7:10–8:00 a.m. PT 8:10–9:00 a.m. MT 9:10–10:00 a.m. CT 10:10–11:00 a.m. ET 1 Hr CPE	Session Details Forthcoming			
9:00–9:20 a.m. MT	Break 20 Minutes			
	Track One	Track Two	Track Three	Track Four
8:20–10:00 a.m. PT 9:20–11:00 a.m. MT 10:20–12:00 p.m. CT 11:20–1:00 p.m. ET 2 Hrs CPE	 Don't Get Struck: Why Financial Experts Get Excluded and How to Avoid It <i>Thaddeus D. Wilson, Jordan W. Leu</i>	 Technology's Role in Transforming Middle-Market M&A <i>Enrique Brito</i>	 More Case Study than Case Law <i>Janae Castell, Lari Masten</i>	 Healthcare Valuation Industry Updates: What to Expect in 2025 <i>Jessica Bailey-Wheaton, Todd Zigrang</i>
11:00–11:20 a.m. MT	Break 20 Minutes			
10:20–11:10 a.m. PT 11:20–12:10 p.m. MT 12:20–1:10 p.m. CT 1:20–2:10 p.m. ET 1 Hr CPE	 You Want the Valuation Experts to Reconcile: Are You Prepared for the Outcome? <i>Jason Pierce, Robert Carter</i>	 The Impact of Tariffs on Small Business Valuation: Risks, Realities, and Best Practices <i>Achille Ekeu</i>	 Forensic Accounting and Elder Fraud <i>Tatevik Torossian</i>	 Small Business Valuations for M&A Deals: Is it Bankable or Am I destroying the deal? <i>Terry Lammers</i>
12:10–1:00 p.m. MT	Lunch 50 Minutes			
12:00–1:40 p.m. PT 1:00–2:40 p.m. MT 2:00–3:40 p.m. CT 3:00–4:40 p.m. ET 2 Hrs CPE	 Adding Transfer Pricing Reports to Your Practice <i>Adam Sher</i>	 Cryptocurrency in Litigation Practice: Tips and Pitfalls for the Financial Forensics Practitioner <i>Dorothy Haraminac</i>	 Launching Your Own Valuation Practice: 25 Do's and Don'ts For Going Solo <i>Sarah Greifenberger, Greg Clark</i>	 AI Tools, Agents, and Software to Build Your Consulting Practice <i>Colin Brown</i>
2:40–3:00 p.m. MT	Break 20 Minutes			
2:00–3:40 p.m. PT 3:00–4:40 p.m. MT 4:00–5:40 p.m. CT 5:00–6:40 p.m. ET 2 Hrs CPE	 Unimpeachable Rebuttal <i>C. Zachary Meyers</i>	 A 10-Year Forensic Analysis of the Financial Statements of the United States of America© <i>Darrell D. Dorrell</i>	 AI, Ethics, and Standards: Important Updates <i>Karen Lascelle</i>	 Exit Planning <i>Anja Bernier</i>
4:40–5:00 p.m. MT	Break 20 Minutes			
4:00–4:50 p.m. PT 5:00–5:50 p.m. MT 6:00–6:50 p.m. CT 7:00–7:50 p.m. ET 1 Hr CPE	Session Details Forthcoming			
	End			

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