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# Association News

Quarterly Newsletter for the National Association of Certified Valuators and Analysts

Third Quarter 2012

## Outstanding Members

We wish to thank and recognize

**Martin H. Abo CPA/ABV, CVA, CFF**

**Roberto H. Castro JD, MST, MBA, AVA**



### Martin H. Abo CPA/ABV, CVA, CFF

Martin H. Abo, CPA/ABV/CVA/CFF is Managing Member of Abo and Company, LLC – Certified Public Accountants / Litigation & Forensic Consultants - with offices in Mount Laurel, New Jersey and Morrisville, Pennsylvania. He has comprehensive experience in individual and corporate financial, business and tax planning. His previous experience includes several years with the tax department and audit staff of a Big Four CPA firm as well as regional firms before he founded the present enterprise.

A graduate of Syracuse University, Marty is an active member and chaired for several years the Litigation Services Committee of the New Jersey Society of CPA's. In addition, he volunteers his time and expertise to many other business and professional organizations: He serves as a Director of Deborah Hospital Foundation; serves as a Director of the Society of Financial Service Professionals-South Jersey Chapter; is an active member and served as President of the Estate and Financial Planning Council of

Southern New Jersey; is an active member and served as a Director of the Chamber of Commerce of Southern New Jersey and serves on the Matrimonial Accounting Interest Group of the NJSCPA. Most recently Marty became a director of Exit Planning Exchange-Philadelphia (XPX), whose members include estate planning attorneys, CPAs, investment bankers, wealth management advisors, commercial lenders, executive coaches, M&A attorneys, marketing and management consultants as well as former

business owners who now advise fellow business owners on exit planning

Marty likes to claim “...*I know what I don't know*” where one astute tax attorney commented “Yes, Abo, *that is a quality you can claim but, even better, you know who knows what you don't know.*”

Marty's reply? “How more fitting in describing my experience with NACVA. Having been a member since 2004 and attended most of the annual national conferences in the interim, I'm always excited to interact and count as friends/colleagues and even worthy adversaries, so many of the professionals I've gotten to know on a local, regional and national level from NACVA.”

Marty continues, “*No doubt I'll be doing this for some time to come. While I'm told the mode of currency in prison may be cigarettes, I can see me in an assisted living facility saying to another resident... 'Hey Bob, you eating that oatmeal? I'll trade for doing your tax return or valuation'. Thank you NACVA.*”

You can learn more about Abo and Company or getting their email alerts by going to [www.aboandcompany.com](http://www.aboandcompany.com) or email Marty directly at [marty@aboandcompany.com](mailto:marty@aboandcompany.com).

### **Roberto H. Castro JD, MST, MBA, AVA**

Roberto H. Castro, JD, MST, MBA, AVA, CVPA, Series 63 and 79

I am honored to be named one of NACVA's Outstanding Members. I have been a member of NACVA since 2003. I am Manager of Wasatch Business Valuation & Litigation Support Services, LLC. (Wasatch Business Valuation), [www.wasatchbusval.com](http://www.wasatchbusval.com), and Senior Advisor, Middle Market Investment banking with Brown Gibbons Lang & Co (BGL), [www.bglco.com](http://www.bglco.com). With NACVA and IBA, I am currently serving as a panelist with a new program called Around the World the Valuation World. I also volunteer my time and effort with Salt Lake based incubators, ACG, CFA Society of Salt Lake, and the Journal of Business Valuation and Economic Damages, where I serve as an Associate Editor.



The valuation services market in Utah is undergoing a gradual transformation and the need for specialized services and knowledge is becoming an imperative. Although I lead the Salt Lake City middle market investment banking operations of BGL, I continue to operate Wasatch Business Valuation. As with a medium sized market, the valuation and litigation support services provided remain market driven, in UT, I am seeing an increase in IP,

professional services, estate and tax valuations services. The same can be said for litigation support. In both instances I am integrating quantitative methodologies, such as Monte Carlo, Real options, and Decision Trees, into the reports.

The middle market investment services account compliment to some extent the services rendered by Wasatch Business Valuation. Although I am currently a generalist, it is increasingly evident that specialization is in order to better serve the clients by knowing both the deal flow and the strategic and financial players in the sector. I enjoy working with BGL not only because the bankers are sector and valuation (healthcare) specialists, but also because as a partner of Global M & A, [www.globalma.com](http://www.globalma.com), I am able to track international developments and within various industry sectors, target overseas opportunities for strategics interested foreign acquisitions and present US investment opportunities to foreign entities. The latter makes for a more robust process, especially when management fully integrates ERPs and undertakes preliminary due diligence and quality of earnings reporting. A proactive and patient process maximizes the returns for all parties. As for estate and gift tax planning and litigation support, I find that my prior legal background and litigation experience is a plus working with legal counsel.

While I enjoy working, I also enjoy reading –my last “fun” book was "*The Immortal Life of Henrietta Lacks*" by Rebecca Skloot–, road biking, occasional sport triathlons, bird watching, and serving as a PAC 12 tennis umpire. I am married to an incredibly patient wife, Anne, and have a talented and inquisitive son, Bradley, that is entering 8th grade.

I love to network and can be reached at [rcastro@bglco.com](mailto:rcastro@bglco.com) and [Roberto.Castro@wasatchbusval.com](mailto:Roberto.Castro@wasatchbusval.com). Again, thank you for this honor.

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Last updated 8/15/2012