



Association News

Quarterly Newsletter for the National Association of Certified Valuators and Analysts



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State Chapter News and Update—Fourth Quarter 2012



Simone Velasquez-Hoover, CPA, CVA, Certified Mediator
Executive Director, NACVA
State Chapter Foundation

“Woman Walks Off A Cliff While Texting”

No, I did not, but this title in a magazine “spoke” to me as I was gathering thoughts for this quarterly article. It reminds me, technology is a good thing but not without risks; as we embrace it—and we have no choice—we will need to “change.” And lastly, the relationships we enjoy often are the glue to keep it all together, as we are doing all that embracing and changing!

Congratulations to our Chapters, as they offer another round of successful meetings. Included in the list are some new faces: The Carolinas, Alaska, Northern Ohio, and some of our Chapters offered new and innovative ideas to meeting content and top tier speakers, including Howard Lewis, Michael Gregory, Gary and Linda Trugman, Michael Kaplan, ValuSource, Jim Hitchner, and others. This was the first time to offer a dual modality program (recorded and/or live webinar). Chapters hosted the “DLOM Applications and Answers” program via recorded webinar, allowing them to schedule it to suit their calendar.

This season we are experimenting with a new “online evaluation” process and got some helpful feedback. Here are some of the comments worth sharing. Our members would like to bring in the outside world, especially referral sources like attorneys, judges, and CPAs. Inviting and programming to appeal to the business community/business owners were also suggested, so we’ll keep that in mind as we begin the planning season for 2013.

Members told us they have different motivations for attending—some come to network and build a group of resource people they can call in the future, others value the inexpensive and convenient CPE, and all enjoy the exchange of ideas between the audience and presenters in the smaller setting. For the first time, the majority stated that video programming would be a welcome piece of a standard Chapter agenda program and most liked the idea of an all-day meeting. We’ll look to clarify and expand our questions in the broader nationwide surveys of our membership. Please be sure to send in a response when the survey lands in your e-mail inbox. We value your input and want to give your Chapter leaders information so they can meet your needs.

Reinforcing the theme of micro-volunteering, members expressed an interest in helping with meeting arrangements, such as CAP, and registration on the day of the event. Some also offered to do member outreach. Chapter leaders: take advantage of this opportunity to delegate a small part of the chapter development to grow a returning volunteer in the process. Think of tasks and projects that take 15 minutes, one hour, three hours, or one week. Offer them to your membership in those terms. Today, many members in organizations around the country like to try out the volunteer experience before committing to

breaks the security into to try out the relevant experience before committing to a leadership role. Breaking the jobs down into smaller pieces will help you find those gems.

Because of the variety of programming available now, it is most important that state leaders keep Headquarters informed of meetings that are planned. Please be sure to send in your meeting calendar/topics either by using the standard Chapter Agreement or by including me on your e-mail invitation. Oftentimes, our members don't get the messages sent to them for any number of reasons, so the centrally posted meeting calendar is a backup system, and we cannot keep it up-to-date if you don't tell us. Visit

http://www.nacva.com/association/State_Chapter.asp to see the list of State Chapters Holding Meetings, which is constantly being updated with the latest meeting plans. Speaking of invitations, be sure to invite **all** your membership to every meeting, not just those who regularly attend.

Transitions are in progress as long-term leaders turn over the reins to a new crop, including Ohio, Georgia, and more to come. Thank you to those of you who have continued to serve and those who have given so many years of your time and talent to grow your local Chapter. Another brief note to those long-term leaders: you may also want to consider extending the opportunity to another member to assume the role as Chapter leader. It is an experience that many look up to, and we want to allow those who have a desire to serve to have an opportunity to experience organizing Chapter events. If you decide to make any changes, be sure to let us know about new faces in your Chapter, and if you decide to elect new officers as well.

The recent volume of the *Family Advocate* magazine of the ABA Family Law section included a call to action from the Chair for members to include a service project in their annual meeting later this month as well as to organize a local service project in March of next year. Consider this as a way to partner with the local bar members and begin a working relationship. Some examples I have seen: A local attorney hosts a holiday party each year with the price of admission an unwrapped toy, a local charity has an annual golf event run by and populated by attorneys, a local bar association collects canned goods at its annual conference and contributes these to a local charity or food pantry, a financial professional hosts an annual "financial literacy training" for members of the military, etc. There are many approaches; if this interests you, I am happy to work with you to expand your Chapter activities.

As we move into the fourth quarter, it is time again to think about planning the 2013 agendas. Chapter leaders should look for a November meeting invitation to the first of three planning sessions to set the State Chapter agenda topics and recruit developers as well as members who will supply the much-needed reports for Case Analysis. Please encourage someone you know to support this very worthwhile program.

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Local state chapter events provide members valuable opportunities to: (1) promote CVAs, AVAs, ABARs, CFFAs, CMAPs, and NACVA 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 available as benefits of membership and, (4) receive economical CPE on timely and relevant topics pertinent to valuation, litigation, and 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/her know of your interest in attending a meeting, being a presenter, or assisting in preparing the materials for a future meeting—or contact me at simoneh1@nacva.com or NACVA's Executive Director, Pam Bailey at pamb1@nacva.com.

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