



# Association News

Quarterly Newsletter for the National Association of Certified Valuators and Analysts



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## Outstanding Members—Fourth Quarter 2012



**Richard M. Wise**  
MCBA, CVA, FASA, FCA,  
CPA, CA, FRICS, CA-IFA,  
CFE, C.Arb

Richard Wise is a Partner specializing in business valuation and financial litigation in MNP's Montréal office. He has more than 35 years of experience in valuations for corporate, transactional, taxation, and litigation purposes as well as damage quantification. He writes and lectures extensively across Canada and the U.S. and has presented more than 200 conference papers in both countries, including the American Bar Association, Canadian Bar Association, American Institute of Certified Public Accountants, valuation societies, and various Faculties of Law.

Richard served as President of The Canadian Institute of Chartered Business Valuators, International Governor of the American Society of Appraisers (ASA), and is Chair of ASA's Business Valuation Standards Subcommittee. He has been a valuation advisor to the Canadian Department of Justice, Canada Revenue Agency, Québec Financial Markets Authority, and the Attorney General of Ontario. He has given expert court testimony in more than 200 cases across Canada and in the U.S. Richard has been appointed by the courts and arbitration panels as their business valuation or financial expert in major financial litigation matters.

Richard was Special Assistant to the Canadian Minister of National Revenue and then partner-in-charge of Business Valuation at a Big-Four accounting firm until he founded Wise, Blackman LLP in 1979, which merged with MNP in 2011.

A McGill University graduate, Richard was designated a Chartered Accountant (CA) in 1965 and elected a Fellow in 1984. He also holds the designations of Investigative and Forensic Accountant (CA-IFA) from the Canadian Institute of Chartered Accountants, Chartered Business Valuator (FCBV), Accredited Senior Appraiser (FASA), Master Certified Business Appraiser (MCBA), Certified Valuation Analyst (CVA), Fellow of the Royal Institution of Chartered Surveyors (FRICS), Chartered Arbitrator (C.Arb.), Certified Fraud Examiner (CFE), and Trust and Estate Practitioner (TEP). Richard is retained to perform U.S.-Canada cross-border valuations for mergers and acquisitions, taxation, fair value measurement for financial reporting purposes, as well as damages quantification.

Richard serves on several boards and committees of professional societies and various charitable organizations and was inducted into the ASA College of Fellows in 2006. The Governor General of Canada awarded Richard a commemorative medal in 1992 for having made significant contribution to the Canadian community.



**James A. (Jim) Koerber,**  
CPA/ABV/CFF, CVA, CFE

Upon notification of being selected as NACVA's Outstanding Member for the Fourth Quarter, 2012, Jim said, "I am truly overwhelmed and blessed to receive this honor."

Jim is a shareholder in The Koerber Company, P.A., a Hattiesburg, Mississippi CPA firm that he founded in 1997, the same year that he obtained his CVA credential from NACVA. Unlike traditional CPA firms, The Koerber Company limits its work to business valuation and litigation support services for attorneys, CPAs, and their clients throughout the Gulf South. Jim has qualified as an expert witness in state courts in Mississippi, Louisiana, Texas, and Florida and in Federal court in Mississippi. The Koerber Company consists of a great staff of three other CPAs (Brian Schmittling, Rob King, and Lisa Bernard), who are all CVAs, and two support staff (Emily Montgomery and Alana Harmon). Jim firmly believes that the services needed by their clients could not be met without this fantastic group of men and women at The Koerber Company.

In 1970, Jim graduated from a small Catholic school, Cathedral High School in Natchez, Mississippi, where he was voted as "Most Courteous" by the nuns. Later, he received the "Dare to Be Dull" Award at his 20-year high school class reunion. Jim attended Mississippi State University (Banking & Finance) and Louisiana State University (Accounting) and has been either working for a CPA firm or in industry since 1976. Jim reminds himself of the valuable lessons that mentors, such as Henry Silvio, Tom Wofford, Billy Gillon, and Jim Burkes, who are all CPAs; Billy Dale and the Dale family of Vidalia, LA; and many other colleagues and friends have taught him during his career.

Jim has been an active member of the Mississippi Society of CPAs (past chairman of the Business Valuation & Litigation Services Committee), the Society of Louisiana CPAs (past chairman of the Litigation Services Committee), the American Institute of CPAs (past member of the National Fraud/Litigation Steering Committee), and NACVA (past president of the Mississippi State NACVA Chapter and past National State Chapter Chairman). He has been a frequent speaker at seminars and conferences, including NACVA conferences, for attorneys, judges, business valuers, and CPAs. He has also been invited to speak to law school students at the University of Mississippi and Mississippi College.

Because of his involvement with NACVA for the past 15 years, Jim said, "NACVA has provided so much help and guidance for my career and my practice." Jim remembers what one speaker at the 1998 NACVA Conference in Washington, DC said, "The more you put into NACVA; the more you will get back from NACVA." Jim has tried to live up to that statement by not only starting the Mississippi State NACVA Chapter and attending NACVA Conferences, but also by being a mentor to other business valuers, freely

sharing his professional experiences and insights with peers. Jim works to foster a collegial and collaborative atmosphere with other business valuers, many of whom have become dear friends.

Jim counts on his faith and the support of Melinda, his wonderful wife of 38 years; his daughter, Emily, who is The Koerber Company's firm administrator and his advisor, and his son, Christian, who provides inspiration to never give up. Jim takes great pride in his family, including his son-in-law, Gray Montgomery, and his two granddaughters, Lillian Claire Montgomery (age 6) and Lacy Gray Montgomery (age 2), who refer to their grandfather as "Big Daddy".

Although he admits to working too much, Jim does find time to enjoy movies, restaurants, and concerts (Pink Floyd, The Rolling Stones, Bruce Springsteen, Paul McCartney, Elton John, and hundreds more). His brother, Brint Anderson, who is a gifted New Orleans musician, has invited Jim to work at an upcoming event as a "roadie", which Jim looks forward to being for a night.

Jim can be reached at [jkoerber@koerbercompany.com](mailto:jkoerber@koerbercompany.com), and his firm's web site is [www.koerbercompany.com](http://www.koerbercompany.com)

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