



Association News

Quarterly Newsletter for the National Association of Certified Valuators and Analysts



In this Issue:

[CEO's Message](#)

[State Chapter News and Update](#)

[Outstanding Members](#)

[New NACVA Members](#)

[Newly Credentialed Members](#)

[For Your Information](#)

State Chapter News and Update—First Quarter 2013



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

ANSWERING THE CALL TO SERVICE—NEW OFFICERS STEP UP

THE CAROLINAS CHAPTER HAS RECONSTITUTED



President

Karen A. Fine, CPA, CVA, CDFA

A Texan by birth, **Karen Fine** began her accounting career at the law firm of Cowles and Thompson, LLC, in Dallas, Texas, which specializes in complex commercial litigation. She worked in Public Accounting at the international firm of BDO Seidman, consulting with a diverse range of clients. Today, she owns her own firm providing a wide variety of services including litigation support, fraud detection, strategic planning, asset tracing, and extensive business analysis. Eager to “give back,” Karen was excited to be part of the team for the Carolinas as she has personally benefited from NACVA’s support in building her business. Karen has gained new clients from her member directory listing on www.NACVA.com.

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Chapter Treasurer

David McIntee, CPA, CVA

David McIntee is a partner in the firm of McIntee Fusaro, Del Corral, PLLC in Hillsborough, NC. With the exception of six months in industry as an internal auditor, he has devoted his entire career to public accounting. The majority of his career was with a small firm where he was a partner for 11 years and now with the present firm of six employees since 1994. David has been active in both the NJ State Society of CPAs and the AICPA and looks forward to sharing his knowledge in building chapter activities to support his peers. Since his relocation to NC, he has become active in business groups in the Triangle region area and agreed to

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has become active in business groups in the tri-state region and agreed to join the team to revitalize the NACVA state chapter of the Carolinas. The Carolina team is rounded out by Chapter Secretary.



Chapter Secretary

Richard R. "Ric" Cox, CPA/ABV, BVAL, CFFA, CVA
Ric Cox of Greenville, NC. Ric founded his full service CPA firm in 1977 and merged with Pittard, Perry Crone, Inc., in January of 2013. He worked for PPC in Atlanta, GA, in the 1970s. He has been active in state and national professional organizations and has written and lectured extensively on a variety of topics.

The two remaining "at large" directors of the chapter are **John Parsley**, CPA, CVA, a senior manager with Rives & Associates, LLP in Lexington, NC, and **Marta**

Jacobus, CPA, CFE, CVA, of CapVal-American Business Appraisers, LLC in Wilmington, NC.

The Carolinas Chapter began meeting in 2012 and looks forward to making 2013 a bigger success.



Colorado/Wyoming Elects New Chapter President **Sheryl Brake, CPA/CFF, CVA**

Sheryl Brake of Eide Bailly, LLP in Boulder is joined by a full slate of officers and directors. They are **Lari Masten**, MSA, CPA/ABV/CFF, CVA, ABAR as Vice President; **Charlotte Hart**, CPA, CVA, CFE as Treasurer; **Tiffany Nelson**, CPA/ABV, CVA as Secretary; **David Velasco**, MBA, AVA, and **Michal Heinrich**, CPA, CVA as Directors. Kevin Call, CPA, CVA is Past President.

We congratulate all the new leaders and wish them much success. This is an opportunity to reach out to them and get involved.

Georgia New President

Adrian R. Loud, CPA, ABV, CFF, CVA, ASA

After 20 years at the helm of a successful State Chapter, Nancy Gault has passed the gavel on to **Adrian Loud**. Adrian is a shareholder of the CPA firm Bennett Thrasher, PC in Atlanta, GA, and manages the Valuation and Litigation Support Services department. He has worked with clients across many industries and at various stages in their life cycle. His experience includes



valuation advisory and litigation support services for engagements such as estate tax planning and compliance, economic damages calculations, transfer pricing, financial reporting, employee stock ownership plans, reasonable compensation studies, 409A compliance, condemnation matters, and intangible asset and intellectual property analyses. Prior to Bennett Thrasher, Adrian worked in the Atlanta office of Willamette Management Associates. He is chairman of

the Georgia Society of CPAs Forensic and Valuation Services Section and the past chairman of the DFK Forensics and Valuation Services Committee. He is also a member of the Estate Planning Council of North Georgia (EPCNGA), The ESOP Association (TEA), and The National Center for Employee Ownership (NCEO).

Learn More about Your New State Officers at the NACVA Member Directory

<http://www.NACVA.com/dir>. All NACVA members please take a moment to update your NACVA membership directory so that future clients can find you. While you are in your member listing, be sure that all contact information is up-to-date and that you have registered in the Speakers Bureau, the Writers' Guild, and as a credentialed subcontractor, if you are looking for new business. These listings are a resource to state chapters and others looking for a particular subject matter expert or speaker for a meeting.

The 2013 Tri-Annual Agendas and State Chapter Meetings

2013 Tri-Annual Agendas are currently being developed. Chapter leaders and

2013 11-Annual Agendas are currently being developed. Chapter leaders and members of the State Chapter Committee met in December to begin choosing the CPE topics and seek talented members of NACVA to help with authoring programs in the following topic areas:

- Practice transition planning
- Develop exhibits and presentations for non-financial audiences
- Risk management in the BV practice
- Ethics in the practice of BV
- Application of the Market Approach for privately-held companies
- Valuation of goodwill and other intangibles

If you are interested in authoring a program, providing a report for Case Analysis, or know someone who can, please contact Simone Hoover at SimoneH1@NACVA.com.

Suggested Chapter meeting dates for this year are: July 19, September 20, and October 25, 2013. Look to NACVA's website for dates for your state meetings.

**Don't forget to register for the Annual Consultants' Conference,
June 5-8, 2013, in Washington, DC.**

Tell Us What You Want:

Members of NACVA are surveyed, one state at a time, to gauge their needs and interests at the local level. This information is used by your state leaders and the State Chapter Foundation to target the activities and offerings we help bring to the local level. If you have something you would like to see happen at a meeting, or would like to be more involved, this is a great way to let us know. We need your input!

New Tools for your Use:

If you are updating your firm's collateral and support materials, did you know that you can download "seals" for NACVA and all your designations? Keep your website and business correspondence looking sharp by including the latest logos for your use. Find these and other support tools for your members in the Professional Development Center at <http://www.NACVA.com/z/members/>.

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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.