



# 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—Second Quarter 2013



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

### Change Is in the Air

*"The only thing constant in life is change," said Francois de la Rochefoucauld, a French classical author from the 1600s.*

#### **New Officers Elected in Mississippi for the 2013/2014 Year. Welcome aboard! They are:**

**Robert D. (Rob) King, Jr., CPA/ABV, CVA, CFE—President.** Rob is a shareholder in The Koerber Company, PA, where he has worked since graduating from the University of Mississippi in 2008. He is responsible for valuation and litigation services and became a shareholder in 2012.

**Stephanie Halphen McKay, CPA, CVA, CFFA—Vice President.** Stephanie is the owner of Halphen-McKay, PLLC in Gulfport, MS. The firm works primarily in the valuation and litigation area with emphasis on matrimonial dissolution and forensic accounting. Licensed in both Mississippi and Louisiana, Stephanie has over 16 years of experience, primarily in auditing.

**Edward T. (Ed) Simmons, CPA/ABV, CVA, CFE, CFF—Treasurer.** Ed is a manager at Home, LLP in Ridgeland, MS. He specializes in business valuation and litigation support within the fraud, forensic, and litigation services group of the firm. A graduate of Mississippi State University with a BS in Petroleum Engineering, Ed went on to get his MBA from the University of Alabama and has achieved several financial designations since. His career started in the IT area with smaller and national firms, including IBM. He later moved into the financial services field and after earning his CPA, transitioned to public accounting to focus on the valuation and litigation support areas.

**Charles P. (Charlie) Rafferty, CPA/ABV, CVA, CFE—Immediate Past President.** Charles remains as a resource to assure a smooth transition. Charles is a shareholder at Grantham Poole, CPAs in Jackson, MS, where his practice is focused on business valuation and litigation support services with extended experience in the insurance and healthcare industries.

**To learn more about Rob, Stephanie, Ed, and Charlie go to the [NACVA Member Directory](#).** All NACVA members, I encourage you to take a moment to update your NACVA member profile so that future clients can find you. Go to the Member Login to access "Update My Member Directory Information." You may be missing out on a tremendous opportunity.

**While the world was watching the news with eyes focused on Boston,**

**the NACVA Massachusetts State Chapter** volunteered to help local businesses get back on track after the disruption of the bombing of the Boston Marathon. See more about this example of leadership at our [LinkedIn Group](#) or [visit PR Web](#).

**The 2013 Tri Annual Agendas for State Chapter Meetings:**

[2013 Tri-Annual Agendas are posted](#). This year we have more options for enhancing or substituting the agenda topics than ever before, we hope you'll find that allows you to meet your members' needs and grow interest in participating in the state chapter activities. Chapter leaders will receive a list of speakers and topics on which they can present for your chapter. These include Howard Lewis, Ed Bortnick, and more. Obtain a list from Pam Bailey at [PamB1@NACVA.com](mailto:PamB1@NACVA.com). The State Chapter Foundation still needs your help with authoring two selected programs in the following topic areas:

- 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 Pam Bailey at [PamB1@NACVA.com](mailto:PamB1@NACVA.com). Chapter meeting dates for this year are: July 19, September 20, and October 25, 2013.

Chapter leaders, please send your notice of scheduled meetings to Pam Bailey so it can be posted on the master calendar. Members, if you have not heard from your state leadership, reach out to them. They want your help and welcome your interest! Click here for a [list of Chapter Presidents](#).

**In Closing**

This will be my last column as the Executive Director of the State Chapter Foundation. After having the good fortune to have had this opportunity for over five years, the time has come to take the state chapter operations to the next level, and that will require more hands-on collaboration than I can provide remotely. It has been my sincere pleasure to serve you. Naturally, the best of it was the opportunity to meet and work with so many of my fellow practitioners, but I would be remiss if I did not point out what a great team we have in Utah. It goes without saying that service brings many benefits and mine are too many to count.

I will remain involved in the organization as it has been the source of so many resources to my career. I look forward to the next step in my own adventure, seeing new developments at NACVA around the U.S. and linking up, or "Linking In", with all of you online and at a NACVA event nearby. With deep respect.

###

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](mailto:simoneh1@nacva.com) or NACVA's Executive Director, Pam Bailey at [pamb1@nacva.com](mailto:pamb1@nacva.com).

Contact Us Toll Free: (800) 677-2009

**Copyright 1996-2013 NACVA**