



Association News

Quarterly Newsletter for the National Association of Certified Valuers and Analysts



In this Issue:

[CEO's Message](#)

[State Chapter News and Update](#)

[Outstanding Members](#)

[New NACVA Members](#)

[Newly Credentialed Members](#)

[For Your Information-](#)
Practice Builder
Academy

Pass Your Case Study
Report on the First Try

State Chapter News and Update—Third Quarter 2013



Pamela R. Bailey
NACVA's Executive Director
State Chapter Liaison

Building a Better, Stronger Team Member Directory

As I write this State Chapter article in the Association News, I reflect on some of the more significant matters members and others have recently addressed with me. One I found most interesting, was an urgent call from an attorney. She described in great detail a scenario she was dealing with in court regarding an individual who had performed a valuation, but had no credential in this field. The attorney was desperately looking for a valuation analyst who specialized in bankruptcy that could advise her whether this individual (who only had a tax background) was pulling his figures out of the air or if they were well founded. Unfortunately, because there were so few members who list his or her areas and/or industry specializations in NACVA's Directory, I was unable to provide her with a CVA in her state. Ultimately, I referred her to a few CVAs in other states.

NACVA's member directory offers a great opportunity to expand and increase **your** exposure to the public and this is a perfect example why. And stories like this happen all the time. All you need to do is follow these simple instructions: go to NACVA's Homepage at <http://www.nacva.com/>, click on the green Member Login button, enter your Member/Customer Number (e.g., 12345). Next, enter your Password. For example, if your name is Joe Valuator, enter the first letter of your first name ("J") and the first four letters of your last name ("Valu") plus your member number ("12345") (i.e., JValu12345). Now you're in the NACVA Members only section—Professional Development Center. In the center, you will find **Update My Member Directory Information**. Click on this link and enter the data from your CV. Be brief, but provide enough information that will indicate your specialty areas and generate new business prospects. Listing your expertise is a valuable tool for attorneys, customers, interns, and even your peers who often need additional support on a valuation project.

State Chapters Initiatives

As many of you know, we have recently taken initiatives to reorganize and expand our support from headquarters to our State Chapters. In doing so, we hope to focus more of headquarters attention on your success, i.e., greater attendance to your events, awareness in the community, and simplification of some of your administrative issues.

While implementing this new plan, we distributed revised By-Laws to each of the Chapters to provide clarity and consistency to the operation of our State Chapter Foundation. One of the changes we implemented was that NACVA HQ established a new checking account for each of the State Chapters with one bank—the Bank of the West in Utah. This change will facilitate the transfer of authority to newly elected officers and will be a tremendous help to HQ to compile annual revenue and expense summaries at yearend.

In addition to opening new accounts, we also purchased swiping devices, which attach to Smartphones or can be upgraded to attach to a laptop for processing credit cards. We hope this will be a great opportunity for all Chapters to accept credit cards from members who register for your programs/events and also to help facilitate collecting fees for Case Analysis as well. Members/Guests will no longer have to plan ahead to bring a firm check or cash to pay for the meeting.

One additional benefit we have put in place is charitable donations when chapter funds grow above and beyond a significant threshold. We believe it's important that our Foundation give back to the communities especially when a disaster or tragedy occurs as we have had in these past few years.

With our reorganization plan, we will continue to move forward this year with our Tri-Annual Agenda format and provide you with PowerPoint presentations, speaker notes, and a sample report for Case Analysis in Person (CAP). However, we are streamlining this process and next year plan to provide all chapters with a central website where you have the option to choose from a wide variety of presentations to offer at state chapter events, including hundreds of pre-recorded webinars. You determine your agenda, choose your own topics, the date of your program (s), then enter your meeting data in a central location (we setup for you), which populates all of your data and is posted/advertised on NACVA's website for the public/members to see.

We hope these changes generate more interest among your members, create new ideas, and reach out to more members in your state to get them involved in your Chapter.

News You Can Use

I discovered an online platform, with the help of Chapter President of Texas, Jeff Harwell, that looks to be a tremendous resource for our State Chapters. This is a "free" service solution offered by MemberPlanet that we are looking at as a total solution for all of our chapters. Their services include:

- Customized E-mail Campaigns
- Event Surveys
- Customized Newsletters for your Chapter
- Group Text Messaging
- Event Registration and Tracking
- Online Donation Campaigns
- Chapter Event Calendars
- Easy to Manage Websites, too

Feel free to check out their website at www.memberplanet.com, they are more than happy to schedule a demo to show you its functionality. Additional options above and beyond the free sections are available for a nominal fee. So far, we are impressed: they are more than willing to assist with state chapter data management, setting up e-mail distributions with Constant Contact, and assisting in establishing a Best Practices Plan. I encourage you to look at MemberPlanet as a resource for Chapter communications and event planning, and give Jeff and me your feedback.

I look forward to talking with all of you and hearing what's going on in your Chapter. Share your news with others so we all can benefit from your success stories. Thank you all for your continued support of the State Chapter Foundation.

###

Local state chapter events provide members valuable opportunities to: (1) promote CVAs, MAFFs, ABARs, 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 and litigation 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 or her know of your interest in attending a meeting, being a presenter, or assisting in preparing the materials for a future meeting—or contact NACVA's Executive Director, Pam Bailey at PamB1@NACVA.com.