

Willamette Management Associates Insights

COMMUNIQUÉ

IN PRINT

Managing directors Robert Reilly and Bob Schweih's co-authored an article that was published in the November/December 2003 issue of *Valuation Strategies*. The article is entitled "M&A Transactions: Why Acquirers Often Overpay in Merger and Acquisition Transactions." Robert Reilly also serves on the editorial board of *Valuation Strategies*.

Robert Reilly also authored an article entitled "The Challenge of Professional Sports Franchise Purchase Price Allocation." That article was published in the October 2003 issue of *The CPA Journal*.

Robert Reilly authored an article in the September 2003 issue of the *American Bankruptcy Institute Journal*. The article was entitled: "The Use of M&A Transactions in Bankruptcy Valuations." This article was part one of a two-part series. Robert also serves as a column editor for the *American Bankruptcy Institute Journal*.

Robert Reilly also authored an article that was published in the August 2003 issue of *The CPA Journal*. The title of the article is: "Business Combination Purchase Price Allocation Procedures."

Robert Reilly also authored an article that was published in the July/August issue of *The Practicing CPA*. The title of the article is: "Gleaning IRS Guidance." *The Practicing CPA* is a publication of the American Institute of Certified Public Accountants.

Robert Reilly also authored an article that was published in the July/August issue of the *American Bankruptcy Institute Journal*. The title of the article was: "Valuation of Technology Companies."

Melvin Rodriguez, director of transfer pricing services in our New York office, authored an article titled: "A Useful Life Analysis of Trade Secrets for Transfer Pricing." This article appeared in the August 6, 2003, issue of the *Transfer Pricing Report*. This weekly publication is published by Tax Management, Inc., a subsidiary of The Bureau of National Affairs, Inc.

IN PERSON

Robert Reilly delivered a speech entitled "Protecting IP Rights from a Non-Tax Perspective" at the annual Taxation of Intellectual Property conference. The conference is conducted each year by the Alliance for Tax, Legal and Accounting Seminars (ATLAS). The conference was held this year in Boston on September 22 and 23.

Robert Reilly also addressed the American Society of Appraisers (ASA) Advanced Business Valuation Conference. This annual conference was held in Chicago this year on

October 16-18, 2003. The title of Robert's address was: "Current Issues Regarding the Valuation of IPR&D."

Robert Reilly will present an 8-hour continuing professional education course for the Institute of Business Appraisers in Los Angeles on October 24. The title of the 8-hour course is "Valuing Intangible Assets."

Robert Reilly will also conduct a three-hour special session at the AICPA National Business Valuation Conference to be held this year in Phoenix, Arizona, on November 16-18, 2003. The title of Robert's session is: "Valuation of Intellectual Property."

Shannon Pratt, managing director, addressed the ASA Advanced Business Valuation Conference in Chicago on October 16-18, 2003. The title of Shannon's address was: "Uses and Misuses of Market Transaction Databases."

Charles Wilhoite, Portland office director, also addressed the ASA Advanced Business Valuation Conference in Chicago on October 16-18, 2003. The title of Charles' address was: "Caracci v. Commissioner: Judicial Prescription for Health Care Valuations?"

Daniel Van Vleet, Chicago office director, also addressed the ASA Advanced Business Valuation Conference in Chicago on October 16-18, 2003. Dan was part of a panel discussion addressing the topic of "S Corporations."

Jacquelyn Dal Santo, Chicago office principal, also addressed the ASA Advanced Business Valuation Conference in Chicago on October 16-18, 2003. The title of Jackie's address was: "Sports Franchises."

IN RECOGNITION

Scott Levine, Washington, D.C. office principal, was recently awarded the ABV credential—Accreditation in Business Valuation—by the American Institute of Certified Public Accountants. The ABV is awarded to CPAs who have demonstrated substantial experience and expertise in the business valuation discipline.

Anna Kamenova, Chicago office associate, passed Level I of the series of examinations required to obtain the professional designation of Chartered Financial Analyst (CFA).

Willamette Management Associates was proud to sponsor the keynote speaker, humorist Dave Barry, at the American Institute of Certified Public Accountants National Business Valuation Conference. The annual conference was held this year on November 16-18, 2003, in Phoenix, Arizona. The conference focused on helping business valuation practitioners learn the latest advances in the field. Under the Willamette Management Associates sponsorship, Dave Barry offered his humorous viewpoints on relationships, politics, and life.