
Willamette Management Associates Insights

COMMUNIQUÉ

IN PRINT

Robert Reilly, managing director, authored an article in *The Real Estate Finance Journal*, Winter 2003 issue. The title of Robert's article was "IRS Publications Offer Real Property Valuation Guidance."

Robert Reilly also authored an article in *Valuation Strategies*, March/April 2003 issue. The title of Robert's article was "Summary of Sarbanes-Oxley Act of 2002."

Robert Reilly also authored an article in the March 2003 issue of the *ABI Journal*. The article is titled "Business/Stock Valuation Discount related to the Built-In Gains (BIG) Tax Liability."

Robert Reilly was quoted in the March 1, 2003, issue of the *Venture Capital Journal*. The title of the article was "VCs Get More Diligent About Due Diligence."

Robert Reilly has updated his chapters in *Valuing Professional Practices and Licenses: A Guide for the Matrimonial Practitioner*, published by Aspen Law & Business. These chapters include: "Differences in the Valuation of Large and Small Professional Practices" (Chapter 9), "Valuing Individual Intangible Assets in Professional Practices" (Chapter 11), and "Accounting Practice Valuation Approaches" (Chapter 29).

Robert Schweih, managing director, was quoted in the March/April 2003 issue of *CFA Magazine*. The title of the article was "Securities Reform: What to Watch For."

Bob Schweih has also updated his chapters in *Valuing Professional Practices and Licenses: A Guide for the Matrimonial Practitioner*, published by Aspen Law & Business. These chapters are entitled "Adjusting the Professional Practice Balance Sheet" (Chapter 2) and "Sample Medical Practice Valuation Report" (Chapter 28).

Dan Van Vleet, Chicago office director and partner of the firm, authored an article in *Trusts & Estates*, March 2003 issue. The article is titled "A New Way to Value S Corporation Securities."

To obtain copies of these articles, e-mail Charlene Blalock at cmblalock@willamette.com.

IN PERSON

Robert Reilly was a presenter at an audio conference sponsored by Business Valuation Resources on March 20, 2003. The topic of Robert's speech was "Excelling During Cross-Examination."

Robert Reilly and Frank Carr (Chicago office principal), gave a presentation at the International Association of Assessing Officers Annual Public Utility Conference, which was held in Tampa in March 2003. The title of the presentation was "The Effect of Recent GAAP Developments on Property Tax Valuations."

Robert Reilly and Frank Carr will present a similar presentation at the Wichita Public Utility Ad Valorem Conference at

Wichita State University in August. The title of the presentation will be "The Effect of FASB Statements 141 and 142 on Property Tax Valuations."

Robert Reilly will present a two-hour speech at the Institute of Business Appraisers 25th Anniversary National Conference on June 2, 2003, to be held in Orlando, Florida. The title of the speech is "The Valuation of Intangible Assets."

Robert Reilly will also conduct two eight-hour seminars for the Institute of Business Appraisers. The conferences will be held on July 10, 2003, in St. Louis and on October 24, 2003, in Los Angeles. The title of each seminar is "The Valuation of Intangible Assets."

Robert Reilly will conduct a three-hour workshop on November 16, 2003, at the American Institute of Certified Public Accountants National Business Valuation Conference, to be held in Phoenix, Arizona. The title of the workshop is the "Valuation of Intellectual Property."

Dan Van Vleet gave a presentation at the 14th International Conference of The Academy of Entrepreneurial Finance at DePaul University in Chicago on May 7, 2003. The title of Dan's presentation is "The Valuation of Privately Held Entities."

Dan Van Vleet will give a presentation to the Alliance of Merger and Acquisition Advisors on July 18, 2003. The title of Dan's presentation is "S Corporation vs. C Corporation Valuation: Valuation and Deal Structuring."

Dan Van Vleet will also give a presentation at the upcoming American Society of Appraisers Advanced Business Valuation Conference in Chicago on October 17, 2003. The title of Dan's presentation is "The Value of S Corporation Equity Securities."

Jack Roosma, New York office director and partner of the firm, was a speaker at the Southern Nevada Estate Planning Council conference in Las Vegas on February 10. The topic of Jack's speech was "Non-Partnership Valuation Issues."

Robert Socol, national director of ESOP services and partner located in the Chicago office, gave a presentation at The ESOP Association annual conference in Washington, D.C., on May 1. The title of Bob's speech was "Advanced Valuation Topics."

To obtain copies of the handout materials for these presentations, e-mail Charlene Blalock at cmblalock@willamette.com.

IN ENCOMIUM

Curtis Kimball, Atlanta office director and partner, was appointed as a member of the Subcommittee for Business Valuation Standards of the American Society of Appraisers Business Valuation Committee. He is currently working on coordination issues with The Appraisal Foundation and the Association for Investment Management and Research.

Bob Socol, Chicago office partner, was elected to a one-year term as chairman of the Valuation Advisory Committee of The ESOP Association at The ESOP Association annual conference in Washington, D.C.