

## Willamette Management Associates Insights

### COMMUNIQUE

#### IN PRINT

Robert Reilly, firm managing director, authored an article that appeared in the Spring 2007 issue of *The Journal of Employee Ownership Law and Finance*. The title of Robert's article was "Effective Business Valuation Reports for ESOP Compliance and Controversy Purposes."

Robert Reilly also authored an article that appeared in the June 2007 on-line newsletter, *AICPA ABV e-ALERT*. Robert's article appeared in the "Ask the Experts" column and was titled "An Introduction to Statement of Standards for Valuation Services No. 1."

Robert Reilly also authored an article that appeared in the July 2007 issue of *Journal of MultiState Taxation and Incentives*. The title of Robert's article was "Quantifying Company-Specific Risk Premium in the Cost of Equity Capital for Property Tax Valuations."

Robert Reilly also authored an article that appeared in the August 2007 issue of *Journal of MultiState Taxation and Incentives*. The title of Robert's article was "Economic Obsolescence in the Property Tax Valuation of Industrial or Commercial Properties."

Robert Reilly also authored an article that appeared in the Summer 2007 issue of the *American Journal of Family Law*. The title of Robert's article was "Ten Elements of the Family Law Business Valuation Assignment."

Robert Reilly also authored an article that was published in the August 2007 issue of *Business Valuation Update*, published by Business Valuation Resources. The title of that article was "AICPA Issues Long-Awaited Valuation Standards: Applications and Exceptions."

Robert Schweihs, firm managing director, had an article reprinted on-line at HGExperts.com. This article originally appeared in Willamette Management Associates *Insights* Spring 2007 issue. The title of Bob's article is "The Application of Daubert Challenges to Economic Damages Expert Testimony in Commercial Litigation Matters."

#### IN PERSON

Robert Schweihs, firm managing director, and Mike Hartman, Atlanta office principal, led a panel discussion of ESOP experts at a continuing professional education (CPE) teleconference held on July 10, 2007. This CPE teleconference was sponsored by Business Valuation Resources. The topic of the expert panel presentation was "The Current Hot Topics Related to the Repurchasing of ESOP Employer Corporation Shares."

Robert Reilly delivered a presentation at the annual Business & Technology Solutions show held in Rosemont, Illinois, on August 22, 2007. This event was sponsored by the Illinois Society of Certified Public Accountants. The topic of Robert's presentation was "Implementation of the New AICPA Valuation Standards."

Curt Kimball, Atlanta office director, delivered a presentation at the ALI-ABA Course of Study at the New York Law School on July 27, 2007. The topic of Curt's presentation was "Valuation Theory and Practice: Family Business Planning."

Curt Kimball will also be presenting at the Tennessee Federal Tax Conference in Franklin, Tennessee, on December 7, 2007. Curt's presentation will focus on updating Tennessee CPAs and attorneys on federal tax law valuation issues and on the analysis of recent developments in the valuation profession.

Bucky Wright, Atlanta office manager, delivered a presentation at the New South Chapter of The ESOP Association in Atlanta on July 26. The topic of Bucky's presentation was the "Repurchase Obligation—Impact on the Employer Corporation Stock Value."

James Rabe, Portland office director, will deliver a presentation at a seminar sponsored by Lorman Education Services in Portland, Oregon, on December 12. The topic of Jim's presentation will be "Valuing Limited Liability Companies."

#### IN ENCOMIUM

Atlanta office director Curtis Kimball and Chicago associate David Chiang were both awarded the 2006 CFA Institute Professional Development Program certificate. This prestigious recognition was presented by the CFA Institute Board of Governors.

Tim Meinhart, Chicago office director, was elected First Vice President of the Chicago Chapter of the American Society of Appraisers.

Mike St. Martin, Chicago office manager, was elected Secretary of the Chicago Chapter of the American Society of Appraisers.

Lisa Tran, Portland office senior associate, recently earned her accredited senior appraiser (ASA) in business valuation professional credential from the American Society of Appraisers.