

Willamette Management Associates Insights

COMMUNIQUÉ

IN PRINT

Robert Reilly, firm managing director and resident in our Chicago office, authored an article that was published in the September 2009 issue of *Wall Street Lawyer*. The title of that article was “The Grant of Employee Stock Options Related to Merged or Acquired Companies.”

Robert Reilly also authored an article that was published in the October 2009 issue of *The Licensing Journal*. *The Licensing Journal* is published by Aspen Publishers, Inc. The title of Robert’s article was “Valuation of IP During a Distressed Economy—Part II.” That article was the second part of a two-part series.

Hestian Stoica, an associate, and Lisa Tran, a manager, both in our Portland, Oregon, office, had a previous *Insights* article reprinted in the August 2009 issue of the *Journal of Business Valuation*. This publication is the journal of the Canadian Institute of Certified Business Appraisers (CICBA). The title of that article was “Business Combinations and the Related Financial Accounting Standards.”

Charles Wilhoite, Portland office managing director, authored an article that was published in the October 2009 issue of the Commerce Clearing House publication *Business Valuation Alert*. The title of Charles’ article is “Health Care System Acquisitions of Medical Practices.”

IN PERSON

Mike Hartman, Atlanta office principal, delivered a presentation at the Carolinas chapter of The ESOP Association on August 27, 2009. The topic of Mike’s presentation was “Playing Through Trouble.”

Mike Hartman also delivered a presentation at The New South Chapter of the ESOP Association on October 22, 2009. The topic of Mike’s presentation was “Selling an ESOP Company.”

Mike Hartman also delivered a presentation at the National Center for Employee Ownership conference in Atlanta on October 27, 2009. The topic of Mike’s presentation was “Fiduciary Issues for Internal ESOP Trustees.”

Mike Hartman also delivered a presentation at The ESOP Association’s Las Vegas Conference and Trade Show on November 13, 2009. The topic of Mike’s presentation was “ESOPs as Acquisition Tools.”

Robert Reilly and Bob Schweih, both firm managing directors, presented a two-hour continuing professional education Webinar for The Institute of Business Appraisers (IBA) on November 5, 2009. The topic of the Webinar was “Intellectual Property Economic Damages Analysis.”

Pamela Garland, Chicago office senior manager, addressed the 28th Annual American Society of Appraisers Advanced

Business Valuation Conference in Boston on October 20, 2009. The topic of Pam’s presentation was “Negotiating Royalty Rates Related to Intellectual Property.”

Robert Reilly delivered two presentations at the American Institute of Certified Public Accountants (AICPA) annual business valuation conference. The AICPA conference was held at the San Francisco Marriott Hotel this year. Robert’s first presentation was titled “A Bankruptcy Perspective in Valuation Engagements—in Good Times and in Bad Times.” Robert’s second presentation was titled “Application of the SSVS No. 1 Professional Valuation Standard.”

Christine Baker, Washington, D.C., area office director, also delivered a presentation at the AICPA business valuation conference in San Francisco. The topic of Christine’s presentation was “Reporting Private Company Returns: Our Business Owner Clients Are Unsung Private Equity Investors.” Christine was also a faculty member for the Financial Consulting Group’s annual symposium in San Francisco on November 14, 2009. This symposium is held each year prior to the AICPA business conference.

IN ENCOMIUM

Bob Schweih received a certificate of appreciation from the American Institute of Certified Public Accountants (AICPA) for his valuable contributions as one of the contributing authors/editors of the 2009 ABV Review Course manual. Bob was also a member of the 2008-2009 AICPA ABV Exam Review Course Task Force.

Robert Reilly was honored to serve as the chair of the American Institute of Certified Public Accountants (AICPA) national business valuation conference. This year, this AICPA conference was presented on November 15 through 17, 2009 in San Francisco. The conference featured three keynote speakers and approximately 40 technical presentations on topical valuation issues.

Robert Reilly is also honored to serve as a member of the AICPA forensic and valuation services executive committee (FVSEC). The FVSEC has professional standards setting authority with respect to CPA valuation analysts. In fact, Robert currently serves as chair of the FVSEC standards task force.

Jim Rabe, managing director of our Portland, Oregon, office, was appointed to a three-year term on the American Institute of Certified Public Accountants (AICPA) Business Valuation Committee.

Vicky Platt, firm research librarian, was recognized as the volunteer of the month for the business and finance division of the Special Libraries Association (SLA). Vicky currently holds the position of SLA vendor relations chair.