

John Q. Protege
Valuation Professional

PROFESSIONAL GOALS:

1. Gain more confidence as a valuation professional.
2. Learn how to properly budget and price valuation engagements.
3. Become more efficient in valuation engagements (come up with a standard process, reporting model, BV software).
4. Improve report writing.
5. Try to transition to more BV engagements and less accounting & audit engagements.
6. Solicit more opportunities for speaking engagements and/or writing articles for publications.

EXPECTATIONS FOR MENTORING RELATIONSHIP:

1. Obtain guidance on utilizing the best available BV resources, especially for guideline public market companies, industry narrative analysis, and local economy.
2. Discuss whether proper balance can be obtained running a BV practice in addition to 'traditional' CPA work (audits, reviews, tax, etc.)?
3. Focus on niche areas within valuations (e.g. tax valuations vs. litigation).
4. Identify practical tips for running a valuation department within a CPA firm.
5. Share 'best practices' and potential pitfalls for certain types of engagements (calculation vs. valuation).
6. Identify stance on changing positions regarding controversial areas (e.g., tax-affecting pass-through entities, etc.) in different engagements.
7. Stress solicitation for honest feedback.

STRENGTHS:

1. Extremely proficient in MS Excel and Financial Modeling/Analysis.
2. Extremely proficient with new technologies / using IT to leverage my time.
3. Much experience in 'calculations' for M&A purposes, advising existing clients on both buy/sell side.
4. Willing to work hard and put in long hours.

WEAKNESSES:

1. Not extremely confident in utilization of business policy 'buzzwords' and macro-economics.
2. Lack confidence in public speaking in front of medium to large crowds.
3. Suffer from overkill of subject matter ('paralysis of analysis', researching internet & reference guides for hours on end before settling on a position).
4. No direct experience in court testimony, expert witness, etc. (except for one deposition).
5. Only written two general articles for a publication.