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## Surviving Audit Review Season: A Panel Discussion

**Thursday, December 12, 2024**

11:45 a.m. - 12:00 p.m. Registration and Networking

12:00 p.m. - 1:45 p.m. Luncheon, Presentation

**Deloitte**

(Printers Row Room)

111 South Wacker Dr, 26<sup>th</sup> Floor

Chicago, Illinois



*Network with colleagues and earn 1.5 CPE.*

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### FEATURED PANELISTS

Rich Lies (Plante Moran)

Ryan Miller (Deloitte)

Justin Pogge (Stout)

### MODERATED BY

Jordan Burdinie (Deloitte)

*Biographies on the following pages*

## Richard Lies, CFA, ASA



Rich is experienced in the valuation of closely-held equity securities, partnership interests and intangible assets including technology, intellectual property, trade names, customer relationships, and non-competition agreements. His assignments have encompassed valuation projects for U.S. and international tax compliance, estate and gift planning, financial reporting, general business planning, merger and acquisition consultation, and litigation support purposes.

Rich holds a B.S. in electrical engineering from Northwestern University and an M.B.A. in finance from the University of Iowa. Rich also holds the Chartered Financial Analyst (CFA) designation and Accredited Senior Appraiser (ASA) designation. Rich is a Former President and Board Member of the Business Valuation Association of Chicago

## Ryan Miller



Ryan Miller is a Deloitte Advisory Managing Director in Deloitte Transactions and Business Analytics LLP. He has over 20 years of global financial consulting and valuation experience with public and private businesses in the U.S. and UK. Ryan's primary focus is in the banking and financial institution industry and has provided financial consulting, financial modeling, and valuation services to national, regional, and community banks. He has also provided services to bank subsidiaries involved in broker dealer activities, private wealth management, mortgage origination, and insurance.

## Justin Pogge



Justin C. Pogge has extensive experience providing business valuation and financial advisory services to public and private companies.

He frequently values businesses, securities, and intangible assets for tax and financial reporting purposes and is well versed in valuation and accounting guidance related to business combinations, impairment testing, stock-based compensation, and other fair value measurements. In addition, he has considerable experience providing fairness and solvency opinions for mergers and acquisitions, significant financing events, and other corporate transactions.

Justin's experience spans a diverse client base and includes a wide variety of industries. He has served clients ranging from start-up companies to multi-billion-dollar enterprises, private equity funds and hedge funds, private clients, professional services firms, and financial institutions.

Prior to joining Stout, Justin was an auditor with Deloitte.

## Jordan Burdinie



Jordan Burdinie is a Managing Director in the Valuation & Modeling practice of Deloitte Risk and Financial Advisory. He has over fifteen years of financial consulting experience, specializing in the valuation of complex debt and equity securities, equity-based compensation, public and privately-held businesses, business interests, and intangible assets. Jordan has advised clients across a diverse group of industries, including but not limited to, financial services, technology, life sciences, and consumer and industrial products.

Jordan has experience in the valuation of public and privately-held businesses and business interests in the context of mergers and acquisitions, litigation and dispute resolution, financial reporting, tax planning and compliance, and strategic planning, including marketable and non-marketable minority and controlling equity interests. Further, Jordan has experience in the valuation of intangible assets and contingent liabilities in the context of business combinations as well as for ongoing compliance purposes.