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**Fair Value for Reporting Purposes: A Panel Discussion**

**Thursday, September 19, 2019**

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

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

**The Standard Club**

**320 S. Plymouth Court, 3rd Floor Mezzanine**

**Chicago, Illinois**

***Network with colleagues and earn 1.5 CPE.***

**FEATURED PANELISTS**

****Rebecca Nelson, CFA

Rebecca Nelson is a managing director and the Chicago City Leader for Duff & Phelps. She is part of the firm’s Financial Services industry program and heads the firm’s Insurance Services Industry sector.  She also leads the Valuation Advisory Services segment in Chicago. Rebecca has over 20 years of financial advisory experience assisting clients with financial and strategic planning; tax, audit and litigation support; transaction analysis, and fresh start accounting.

Rebecca's areas of expertise include the valuation of businesses, intangible assets, and financial assets and liabilities in the financial services industry. She has managed or participated in hundreds of advisory engagements that have included the valuation of common and preferred stock; debt securities; loan portfolios; derivative securities; indemnities and guarantees; contingent assets and liabilities; deferred revenue liabilities; accounts receivables and credit card receivables, and intangible assets, among others.

Rebecca joined Duff & Phelps in conjunction with the merger of Standard & Poor's Corporate Value Consulting (CVC) with Duff & Phelps. Prior to the merger, Rebecca was a manager at PricewaterhouseCoopers Financial Advisory Services. Rebecca received her M.B.A. in finance, accounting, and international business from the University of Chicago, Booth School of Business and her B.S. in finance from the University of Illinois at Urbana-Champaign. She holds the Chartered Financial Analyst (CFA) designation and is an Accredited Senior Appraiser (A.S.A.). She is a member of the CFA Institute, the Investment Analyst Society of Chicago, the Business Valuation Association, and the American Society of Appraisers.

Daniel M. Lynn, CFA, ASA

Dan Lynn is a Principal and member of Deloitte Transactions and Business Analytics LLP and serves as the local practice leader for Deloitte’s regional business valuation practice. He has over 30 years of experience in valuing both closely held business interests and intangible assets for a variety of transaction related, tax and accounting purposes as well as in providing a range of valuation, strategic financial planning and other financial advisory services in connection with mergers, acquisitions, bankruptcy, reorganization, litigation and other settings. He has provided expert testimony related to valuation matters in various Federal, State and U.S. Bankruptcy courts.

Dan is a Chartered Financial Analyst (CFA); Senior Member of the American Society of Appraisers (ASA); and Past President of the Chicago Chapter of the American Society of Appraisers. Dan earned an MBA in Finance and Accounting from the University of Chicago, and a BBA in Finance from Western Illinois University.

****Evan Sussholz, CPA, CFA

Evan Sussholz is a Partner with EY’s Transaction Advisory Services (TAS) practice.  Mr. Sussholz has approximately 20 years of experience assisting clients with buy side and sell side transactions and is currently the EY’s Central Region Corporate Finance leader and TAS leader for Health Sciences & Wellness.  Evan has significant experience in M&A valuations, strategic planning, financial reporting and tax planning. Evan serves as the EY Global Client Services Partner and TAS account leader for several large global companies that operate within the Medical Technology, Life Sciences and Industrials industries.

Mr. Sussholz is a former Professional Accounting Fellow in the Office of the Chief Accountant at the U.S. Securities and Exchange Commission (SEC).

Mr. Sussholz earned a MBA from Northwestern University’s Kellogg School of Management. He received a BA in Accounting and Finance from Indiana University. Evan is a Certified Public Accountant (CPA) in Illinois and CFA charter holder.

**MODERATOR**

****Gary Frantzen, CFA

Mr. Frantzen has more than 30 years of experience specializing in the valuation of businesses and business interests including equity interests, liabilities and debt securities, fairness and solvency opinions, options and other derivatives, and intangible assets.

He has provided opinions of value, fairness and solvency for many purposes such as acquisitions, divestitures, business and strategic plan reviews, business unit performance measurement, SEC filings, US GAAP and other financial reporting requirements; US federal, state, and non-US tax reporting requirements, regulatory compliance, various dispute resolution procedures and general advisory purposes. Mr. Frantzen has served as an expert on business and asset valuation issues in a variety of litigation and disputes and has provided testimony in U.S. District Courts, international arbitration forums and various state and local court jurisdictions.

Mr. Frantzen has worked with clients across a wide variety of industries such as healthcare services, basic and specialty chemicals, automotive & aerospace, construction engineering and materials, business & consumer services, infrastructure and utilities, financial institutions/insurance, food & agricultural products, paper & packaging, retail/wholesale distribution, transportation/logistics and industrial machinery & equipment.

Mr. Frantzen earned a Bachelor of Science in Civil Engineering from the University of Illinois at Urbana-Champaign and a Master of Business Administration in Finance from DePaul University’s Kellstadt Graduate School of Business in Chicago. Mr. Frantzen is a CFA Charterholder (Chartered Financial Analyst) and an Accredited Senior Appraiser (ASA), American Society of Appraisers. He is currently a member of the CFA Institute, the CFA Society of Chicago and the American Society of Appraisers.