



MOVING FORWARD

2021 CONFERENCE AGENDA

Sonesta Charlotte

WEDNESDAY 9/22/21

EVENT

LOCATION

12:00 - 1:00PM	Registration	Lobby
1:00 - 5:00PM	IBBA Course #204: Effective Deal Team Mgmt: Working Together to Close More Deals - Roman Basi	Salon 1
5:00 - 6:00PM	CVBBA Board Meeting	Board Room
6:00 - 8:30PM	CVBBA Welcoming Reception and Networking Event - Sponsored by Diamond Financial Services	Pool Deck

THURSDAY 9/23/21

6:30 - 8:00AM	Continental Breakfast/Registration - Sponsored by First National Bank	Salon A&B Foyer
8:00 - 8:30AM	Welcome and Opening Remarks - Adam Petricoff	Salon A & B
8:30 - 8:45AM	Legislative Update - Steve Mariani	Salon A & B
8:45 - 10:30AM	Keynote Topics 1) Valuations in Today's World - Darren Mize 2) How Potential Tax Changes Will Impact Deals - Roman Basi 3) Utilizing Technology in Your Practice - Ron West	Salon A & B
10:30 - 11:15AM	Break with Sponsors	Salon A & B
11:15 - 12:00PM	Workshops Rotation	
Two back-to-back 20 minute rounds with a 5 minute break in between. Round 1: 11:15 - 11:35 Round 2: 11:40 - 12:00	Workshop 1 - Best Practices: Communicating With Clients: During and After the Engagement - Tully Ryan Workshop 2 - Best Practices: Handling WIP and Gift Cards - Steve Mariani <i>(Each Workshop will be repeated for each Round)</i>	Salon C Salon D
12:00 - 1:00PM	Lunch - Sponsored by Customers Bank	FFT Restaurant
1:00 - 2:00PM	Best Practices: The Seller Interview - Jay Offerdahl	Salon A & B
2:00 - 2:15PM	Break	
2:15 - 3:55PM	Workshops Rotation	
Three back-to-back 30 minute rounds with a 5 minute break in between. Round 1: 2:15 - 2:45 Round 2: 2:50 - 3:20 Round 3: 3:25 - 3:55	Workshop 1 - Growing Your Practice: Hiring, Training and Retaining Your Team - JT Tatem, Dustin Zeher Moderator - Rupesh Bharad Workshop 2 - Best Practices: Using a Data Room in Your Transactions - Ginger Dean Workshop 3 - Best Practices: Using a CRM to Manage Your Business - Neal Isaacs, Ron West <i>(Each Workshop will be repeated for each Round)</i>	Salon A & B Salon C Salon D
3:55 - 4:30PM	Break with Sponsors	Salon A & B
4:30 - 5:30PM	From LOI to Closing - A Bankers Perspective: What Brokers Can Do to Get More Deals Done, Quicker! Moderator - Ron Buck	Salon A & B
5:45 - 7:30PM	Networking Reception, Dinner and Drinks - Sponsored by Live Oak Bank	Pool Deck

FRIDAY 9/24/21

6:45 - 8:00AM	Breakfast with Sponsors - Sponsored by Nexsen Pruet	Salon A&B Foyer
8:00 - 9:00AM	Legal Deal Killers and How to Avoid Them - Jim Joyce, Ashleigh Greene; Moderator - Rick Chess	Salon A & B
9:05 - 11:45AM	Workshops Rotation	
Three back-to-back 50 minute rounds with a 5 minute break in between. Round 1: 9:05 - 9:55 Round 2: 10:00 - 10:50 Round 3: 10:55 - 11:45	Workshop 1 - Best Practices: Evolving Your Practice & Moving Up Market - Matt Bradbury Workshop 2 - Best Practices: Recasting Challenges - Mark Pompeo Workshop 3 - Getting New Engagements in a Post-Covid World; What is Working NOW? - Mike Metzger <i>(Each Workshop will be repeated for each Round)</i>	Salon A & B Salon C Salon D
11:45 - 12:00PM	Attendees grab box lunch - Sponsored by Aquesta Bank	Salon A & B
12:00 - 1:00PM	Moving toward a CVBBA MLS? Presentation by Adam Petricoff, Joe Santora, Jim Turner	Salon A & B
1:00PM	End of Meeting/Wrap Up/ Raffle Prizes	Salon A & B

Keynote Speakers



Roman Basi

The Center for Financial, Legal, and Tax Planning, Inc.

Roman is a licensed attorney in Illinois, Missouri, Florida and Arizona. He is also admitted to the United States District Court for the Southern District of Illinois, the United States Court of Appeals for the 7th Circuit, and admitted to practice in the United States Supreme Court. Roman is also a licensed Certified Public Accountant (CPA). He is also a licensed Managing Real Estate Broker in Illinois with Heartland Realty & Rentals, Inc., a licensed Real Estate Sales Associate in Florida, a licensed Title Insurance Agent with ATG Fund, Inc. Over the past several years, Roman has worked on many business transactions and has lectured to various regional and national audiences throughout the country, including extensive work in the continuing education field for Attorneys and CPA's as well as providing the education necessary for the Voluntary Tax Return Preparer Registry with the IRS.



Darren Mize

GCF Business Valuation & PeerComps Small Business Transaction Data

After a decade of working in the business and finance sectors, Darren co-founded GCF Valuation with his brother Steve in 1997. Since then, Darren has helped build GCF to be one of the largest and most respected valuation firms in the country, working with hundreds of SBA lenders nationwide. While Darren's initial role at GCF was business development and securing top business brokerage firms as clientele, he quickly became an Accredited Senior Appraiser to help with the increasing client volume. He currently manages the Firm's M&A Division, Sales & Marketing and maintains his ASA designation. Darren strives for excellence and service in business valuations, and for the past 20+ years has attended countless conferences and developed hundreds of professional relationships, many of which have also turned into personal friendships. He understands no single approach works for every business, so he continues to educate himself on emerging business valuation trends across multiple industries.



Ron West

Business Brokerage Press and Deal Studio

Ron West is Founder of Deal Studio a marketing automation firm and President of Business Brokerage Press, publishers of the Business Reference Guide (BRG) and distributor of a wide range of industry guides and resources – all to the Business Advisory & Brokerage Industries. Ron started working with the family on Business Brokerage Press during his college years in the late 1990's learning, he too had a passion for the industry. Fresh out of college, Ron and his dad launched the company Generations where they sold businesses for several years while he still participated in activities with Business Brokerage Press. Ron has spent more than two decades pursuing his interest with creating systems and tools for marketing and technology to be used in the industry – learning much through his successes and failures which brings him to where he is today.

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