

Willamette Management Associates Insights

COMMUNIQUE

IN PRINT

Robert Reilly, firm managing director, authored an article that appeared in the Summer 2005 issue of *The Journal of Employee Ownership Law and Finance*. The title of Robert's article is "Valuation Adjustments in ESOP Employer Stock Valuations."

Robert Reilly also authored another article that appeared in the Summer 2005 issue of *The Journal of Employee Ownership Law and Finance*. The title of Robert's second article is "Procedures for Financial Advisers to Help ESOPs Avoid Overpaying in Acquisitions."

Robert Reilly co-authored a chapter in the recently revised edition of *ESOP Valuation*, a text published by the National Center for Employee Ownership in Oakland, California. The title of Robert's chapter is "ESOP Valuation and Financial Advisory Analysis Due Diligence Checklist."

IN PERSON

Robert Reilly addressed the 2005 Institute of Property Taxation Symposium in San Antonio, Texas. The title of Robert's presentation is "Is Obsolescence Obsolete? Procedures to Identify and Justify Obsolescence Allowances."

Robert Reilly gave a presentation at the Strategic Research Institute's 2nd Annual Intellectual Property Financing and Securitization Summit on September 26 and 27, 2005, in New York City. The topic of Robert's panel discussion was "A Review of Pharma & Drug Royalty IP Market Developments."

Bob Schweihs, firm managing director, gave a presentation at the Strategic Research Institute's 2nd Annual Intellectual Property Financing and Securitization Summit in New York City. The topic of Bob's panel discussion was "Brand Appraisals and Brand Valuation Approaches."

Curtis Kimball, Atlanta office director, will give two presentations at the American Institute of Certified Public Accountants/American Society of Appraisers National Business Valuation Joint Conference November 14 through 16, 2005, in Las Vegas, Nevada. On November 14, Curt will give a presentation on "Case Law Update." On November 15, Curt will give a presentation on "Ethics."

Daniel Van Vleet, Chicago office director, will also give a presentation at the American Institute of Certified Public Accountants/American Society of Appraisers National Business Valuation Joint Conference in Las Vegas. The topic of Dan's presentation on November 14 will be "The

Valuation of S Corporations and Other Pass-through Entities."

Charles Wilhoite, national director of health care financial advisory services, and Peter Ketchum, Atlanta office principal, will present the welcoming remarks at a reception at the Illinois Association of Healthcare Attorneys Annual Symposium on October 26, 2005, in Chicago. Willamette Management Associates is the sponsor of that reception.

Mike Hartman will present at The ESOP Association Two-Day ESOP Technical Conference in Las Vegas, Nevada, on November 10 and 11, 2005. The topic of Mike's presentation is "Recent ESOP Developments."

Alan Schachter, principal and director of our Westport, Connecticut, office, delivered a presentation to the Attorney Round Table in Garden City, Connecticut, on September 15, 2005. The topic of Alan's presentation was "Recent Developments in Cost Profits/Economic Damages Analyses Prepared for Litigation Purposes."

IN ENCOMIUM

Alan Schachter, principal and director of our Westport, Connecticut, office, has been appointed to serve as a member of the American Bar Association Family Law Section Committee.

David Chiang, Chicago office associate, and Chip Brown, Atlanta office associate, both passed the level II examination leading to the chartered financial analyst (CFA) designation. This designation is offered by the Institute of Chartered Financial Analysts.

At our firm's annual employee retreat, held in August this year at the O'Hare Hyatt Hotel in Chicago, we recognized the following Willamette Management Associates employee anniversaries:

25 years

Kathie Martin
Portland office

15 years

James Rabe
Portland office

Charles Wilhoite
Portland office

Daniel Van Vleet
Chicago office

10 years

Mary McCallister
Chicago office

5 years

Adrian Loud
Atlanta office

Tim Meinhart
Chicago office

Stephanie Bowker
Chicago office

Kristine Taylor
D.C. office