

**Business Valuation Practice Group Telemeeting**

**October 20, 2020**

**2:00 p.m. Eastern Time**

Our next call will be an open discussion about valuation topics. Here is a list of some questions to spark conversation. The intent is to impart knowledge on each other by sharing stories, thoughts, and helpful resources.

1. What do you use for your discount rate support?
2. Thoughts on using small company premium.
3. What do you use for DLOM support?
4. What do you use for GPC data?
5. Seeing an uptick in calculation engagements?
6. What are you doing for clients that want a first brush valuation, just to see where they are.
7. What have you been doing in light of COVID that other valuation folks could benefit from or stay away from?
8. Seeing any trends in types of engagements?
9. Where do you get your models (legacy, self-made, software)?
10. **Does anyone have any special circumstances going on right now and want to discuss or seek other opinions?**
11. Does anyone have experience with the $500 valuations I see advertised on Google ads?
12. Why is it a bad idea to list prices on your website?
13. What is your best source of referrals?
14. Do you outsource to other CPA firms?
15. Do you have assistance?
16. Have you tried an external contractor (off-shore)?
17. Have you had any luck hiring someone?
18. Interns?
19. Were you brought in as a full-time valuation employee or did you transition?
20. **Any questions you have at this point?**
21. What is the best training source you have found?
22. Do you subscribe to any training passports?
23. Did anyone attend the ASA Conference, any take-aways?
24. What do you give for a turnaround time?
25. Do you have anything prepared that you send after someone contacts you, such as a standard document request list?
26. Does anyone keep a blog?
27. Read a blog?
28. Belong to any active valuation discussion groups?
29. How many 409a valuations do you have?
30. **Any questions you have at this point?**
31. Valuation podcasts?
32. Do you accurately track hours per valuation?
33. Does anyone subscribe to Hardball with Hitchner?
34. What publications do you subscribe to?
35. Thoughts on AI.
36. Use the excess earnings method?
37. Use social media?
38. Thoughts on non-CPAs getting the ABV.
39. New ways of networking? What is working?
40. **Any questions you have at this point?**
41. What are your busiest months?
42. What do you do in downtime?
43. Do you have a mentor?
44. What BKR resources do you use most often?
45. Where do you get econ data?
46. Where do you get industry data?
47. Does anyone use IBIS World?
48. What was your favorite valuation?
49. Was this useful?
50. **Any other questions?**