

WILLIAM HARRIS, ASA, CFA PROFESSIONAL QUALIFICATIONS

Experience

Valuation Analyst at Trugman Valuation Associates, Inc. specializing in business valuation. Experience includes a variety of assignments including closely-held businesses, professional practices and thinly traded public companies. Industries include health care, retail, manufacturing, distributors and service.

Business valuation services have been rendered for a variety of purposes including, but not limited to, business damages, estate and gift tax matters and family law matters.

Professional Designations

- ASA: Accredited Senior Appraiser designated by the American Society of Appraisers (2013). Reaccredited in 2016.
- CFA: Chartered Financial Analyst designated by the CFA Institute (2012).

Education

- M.S., Finance, Chapman Graduate School of Business at Florida International University, 2007.
- B.S., Business Administration, Belk College of Business at the University of North Carolina at Charlotte, 2006.

Appraisal Education

- *International Conference*, Live Webcast, American Society of Appraisers, 2020.
- *Advanced Business Valuation Conference*, New York, NY, American Society of Appraisers, 2019.
- *Advanced Business Valuation Conference*, Live Webcast, American Society of Appraisers, 2018.
- *Advanced Business Valuation Conference*, Houston, TX, American Society of Appraisers, 2017.
- *Advanced Business Valuation Conference*, Boca Raton, FL, American Society of Appraisers, 2016.
- *Expert Witness Bootcamp*, Hollywood, FL, National Association of Certified Valuators and Analysts, 2015.

WILLIAM HARRIS, ASA, CFA
PROFESSIONAL QUALIFICATIONS

Appraisal Education

- *Advanced Business Valuation Conference*, Las Vegas, NV, American Society of Appraisers, 2015.
- *AICPA Forensic and Valuation Services Conference*, New Orleans, LA, American Institute of Certified Public Accountants, 2014.
- *AICPA Forensic and Valuation Services Conference*, Las Vegas, NV, American Institute of Certified Public Accountants, 2013.
- *Special Topics in the Valuation of Intangible Assets*, Reston, VA, American Society of Appraisers, 2013.
- *AICPA Forensic and Valuation Services Conference*, Orlando, FL, American Institute of Certified Public Accountants, 2012.
- *Valuation of Intangible Assets*, Skokie, IL, American Society of Appraisers, 2012.
- *AICPA National Business Valuation Conference*, Las Vegas, NV, American Institute of CPAs, 2011.
- *The Correct Way to Use Ibbotson and Duff and Phelps Risk Premium Data*, Webinar, Valuation Products and Services, 2011.
- *USPAP for Business Valuation*, South Beach Miami, FL, American Society of Appraisers, 2010.
- *Advanced Topics in Business Valuation*, Bethesda, MD, American Society of Appraisers, 2010.
- *AICPA National Business Valuation Conference*, San Francisco, CA, American Institute of CPAs, 2009.
- *The Market Approach*, Skokie, IL, American Society of Appraisers, 2009.
- *The Income Approach*, Orlando, FL, American Society of Appraisers, 2009.
- *Introduction to Business Valuation*, Minneapolis, MN, American Society of Appraisers, 2008.

Author

- Author of "Trugman Valuation Associates, Inc. (TVA) Restricted Stock Study," *Business Valuation Review* (Fall 2009).
- Co-Author of "How Should You Value Closely Held Businesses During These Crazy Times?," *Business Valuation Update* (August 2009).

WILLIAM HARRIS, ASA, CFA
PROFESSIONAL QUALIFICATIONS

- Author of “Trugman Valuation Associates, Inc. (TVA) Restricted Stock Study - An Update,” *Business Valuation Review* (Winter 2011).
- Contributing Author to “Understanding Business Valuation: A Practical Guide to Valuing Small to Medium-Sized Businesses,” American Institute of Certified Public Accountants, Fourth Edition (2012).
- Contributing Author to “Understanding Business Valuation: A Practical Guide to Valuing Small to Medium-Sized Businesses,” American Institute of Certified Public Accountants, Fifth Edition (2017).

Organizations

- American Society of Appraisers.
- CFA Institute.
- CFA Society of Miami.