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March 2022 Newsletter

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Nor Cal Chapter President's Remarks

With spring around the corner, I think we're also turning the corner away from the pandemic. Many of us have started to go back to our offices, and sole practitioners are reconnecting with their clients and peers in person. While the Board is continuing to meet virtually, I am optimistic to resuming in-person Chapter dinner meetings before summer begins. It will be great to reconnect face to face!

We are continuing to offer virtual continuing education, and had great success with our recent events covering insights in our national and Bay Area economies, strategies for growing your appraisal practice, and valuation of jade objects. Upcoming confirmed events include valuations of Japanese prints, wearable art, appraisal practice management, valuation of fractional interests in real estate (in partnership with the Los Angeles chapter), and a 7-hour USPAP update (personal property). Please see the below links for additional information and registration options for these events.

Lastly, we are continuing to work with the Los Angeles and San Diego chapters in securing a lobbyist to represent the interests of all disciplines. As this has a direct financial impact to the chapter and its members, we will be sending out a survey to gauge our members' interest in pursuing this. Keep an eye out for upcoming invitations to our next in-person chapter social events, we're looking forward to (not virtually) seeing you soon!

Regards,
Matt Dianich

7-Hour USPAP Update Course and Survey

ASA NorCal is pleased to offer our members the 7-Hour USPAP Update course for PP, GJ and MTS taught by Mona Miller.

Date and time: Sunday, March 27, 2022; 9am - 4pm PST

This course is open to NorCal chapter members through March 15, after which we will open registration to other Region 5 chapters including SoCal and Portland.

PLEASE NOTE:

Registrants will need to have a copy of the 2020-2021 USPAP Manual and will receive an electronic copy of the 2022-2023 Student Workbook

Please direct any questions to our chapter USPAP Coordinator **Maury Woulf**

Registration Fee: \$250

[Register Here](#)

Mona Miller is the Principle/Director of Pacific Gem Labs in Portland, Oregon since 1989. Pacific Gem Labs specializes in Gem & Jewelry Appraisals, Forensics and Consultation. Ms. Miller is a Fellow of the Gemological Association of Great Britain (FGA), a Graduate Gemologist (GG) from the Gemological Institute of America, a Fellow of the American Society of Appraisers (FASA), and an Independent Certified Gemologist Appraiser (ICGA) with the American Gem Society, among other organizations. Ms. Miller is a University adjunct professor, educator of gemology and valuation science and Certified USPAP Instructor with The Appraisal Foundation. She has developed and written several Gems and Jewelry Specialty classes as well as the ASA Principles of Valuation classes, and the Personal Property USPAP Course.



In an effort to help us plan future USPAP courses, please take a moment to fill out this survey about your USPAP status

Survey

Professional Development



**Women's Affinity Group Meeting
March 23, 2022
4pm to 5:15pm PST**

Women of ASA from all chapters and disciplines are invited to join **ASA NorCal's Women's Affinity Group** for our first meeting of 2022.

The goal of ASA NorCal's Women's Affinity Group is to provide a forum for knowledge sharing, networking and mentorship, as well as supporting the development/career advancement of women in valuation and appraisal. Our meeting provides an opportunity to meet a diverse mix of women – in a variety of disciplines (BV, M&E, real estate, personal property, and gems and jewelry) – as well as in different stages of their careers and at varying types of companies (from solo practitioners to large firms).

March's virtual event will be interactive, and will involve two main agenda items:

- An interactive panel and attendee discussion covering discipline-specific practice and client observations/trends (over the last year) as well as outlook and future issues to consider and plan for in 2022.
- Small networking breakout groups (so folks can continue to get to know each other better)

Our meeting will be a great opportunity to step away from your daily client and project work to catch up with old friends as well as meet new colleagues. We hope you can join us!

Registration is Free

[Register Here](#)

Managing an Appraisal Practice

April 27, 2022

10:00am-12:00pm PST

How do you manage your appraisal practice? Join us for a panel discussion as three appraisers from different disciplines and different-sized firms share their business practices related to company formation, business development and networking, daily operations, technology tools, and accounting systems. Belle Walker of Belleview Consulting will moderate the panel addressing common day-to-day operational challenges and provide efficient solutions. The webinar will also allow for an open discussion forum for all registered to participate.

Panelists:

Petra Loer, ASA, BV

Managing Director in the Valuation Services Group at Andersen

Dana Teicheira, ASA, MTS,

Commercial Marine Vessels Appraiser, Teicheira Maritime Surveyors, Inc.

Andrea Roth, ASA, PP

Fine Art Appraiser, Roth Fine Art Appraisals, Inc.

Belle Walker, Founder, Belleview Consulting

2 hrs CE Credit, \$35 Registration Fee

More Information & Registration

Personal Property News

Valuing Japanese Prints **Presented by Katherine Martin, Director of Scholten** **Japanese Art Gallery**

May 4, 2022
Save the Date
More Info to Come

Artists as Jewelers, Jewelers as Artists: Blurring the **Boundaries and Challenging the Appraiser**

Presented by
Carole Richbourg
Teri Brossmer
Julie Simpson

June 1, 2022, 10am - 11:30am PST



Evelyn Hofer, Anjelica Huston wearing Calder's "Jealous Husband" (c. 1940), N.Y., 1976. Image courtesy of the Estate of Evelyn Hofer. Artwork ©2017 Calder Foundation, New York / Artists Rights Society (ARS), New

The intersection of fine art and jewelry has been of interest to many sculptors and jewelry designers. Art jewelry is getting some serious attention as major auction houses are beginning to show interest in this genre. Fine art and jewelry appraisers are therefore encountering the challenges in appraising art jewelry as the two disciplines converge and collaborate. We have assembled a panel of experts to discuss such issues as: are the objects considered fine art or jewelry, ranking and value characteristics, uniqueness of design vs. materials, methodology and valuation sources. We will also hear from an experienced

York.

collector about her collecting strategies and how they have evolved over many years

[More Information & Registration](#)

\$25 Registration Fee
1.5 CE Credits

Bad Things Can Happen to Good Wine Presented by Bill Edgerton

Coming in September 2022

[BV Programs & News](#)

Fireside Chat with Jennifer Ceran – From Treasurer to CFO to Current Member of Five Boards

March 17, 2022
4:30pm to 5:30pm PT

As part of ASA NorCal's collaboration with the Financial Executives International San Francisco Bay Area chapter, ASA members are invited to the fireside chat event.

Registration is free

[More Information and Registration](#)

Six Benefits of Monitoring Company Value By Al Statz, Exit Strategies

Even if your business is not for sale, monitoring its market value can be incredibly helpful. This article describes six ways that understanding value over the life of a closely held business benefits shareholders, directors and managers.



Disclaimer: The views, opinions, or examples included in the linked video and article above are those of the authors and do not necessarily reflect an official policy or position of ASA NorCal or its members.

Member Spotlight

Joe Crescent, ASA, ARM

Jo Crescent is the first ARM applicant under the updated POV courses and accreditation pathway to be approved as an Accredited Senior Appraiser by ASA. We are proud of Jo and wanted to spotlight her recent accomplishment and learn more about her.



What drew you to the appraisal profession and your particular specialty?

I started working with Jack Young, my husband, in his appraisal business as an office manager. As I got more involved in the business, I got more interested in the appraisal process. However, after taking 3 POV classes, I realized that equipment appraisal was not going to work for me. When Bob Podwalny & Jack started focusing on Appraisal Review & Management, I realized that ARM was a great opportunity for me to earn an ASA.

What are the best circumstances that clients/prospects should come to you for help?

I intend to use the ARM designation to help appraisers develop their reports as fully and clearly as possible. That's a good use of my experience in the appraisal business, my organizational skills, and my writing/editing background. I've done a lot of appraisal subject editing with ASA and with individual appraisers. For instance, I worked with different aircraft appraisers on appraisal reviews for court cases. Last year I assisted an attorney with editing a legal brief. Currently, I do article editing for the M&E journal and the ARM journal. Of course, I'm also capable of doing straightforward appraisal review.

Please describe an interesting project you worked on recently.

I had a lot of fun working with MTS appraiser Franklin Reid on an article for the MTS journal about his management of a multifaceted appraisal of the

Jamaican sugar industry. We reorganized and edited his lengthy and detailed submission into a compelling story of how a coalition of local appraisers won the assignment of the the largest public sector valuation exercise conducted in Jamaica, focusing on the complex process of appraisal collaboration. The article was originally printed in the MTS Journal and reprinted in the ARM journal.

What do you enjoy doing when you're not working?

I read a lot. Mostly fiction but also non-fiction books that address more wide-ranging topics — like Lawrence Busch’s *Standards*, or the tome I’ve just gotten from the library *The Dawn of Everything: A New History of Humanity*. I also like to get outdoors: if not hiking or backpacking, at least walking through the neighborhood or drinking my coffee in the front yard.

What's your guilty pleasure?

Netflix series for sure. I try to be selective and limit my watching. I’ve recently finished “Call My Agent” and am trying to take a break before plunging back in!

Jo Crescent is part owner and operations manager of NorCal Valuation Inc. and has been an ASA member since 2011. She specializes in providing appraisal editing and review services to clients and ASA appraisers, mostly with the MTS discipline; she has worked within that discipline for over 10 years and completed 3 MTS POV classes.

Jo graduated from Grady College of Journalism and Mass Communication, University of Georgia, and went on to work in printing, layout, editing, and marketing content. She was developmental editor of the 4th edition of *Valuing Machinery and Equipment: The Fundamentals of Appraising Machinery and Technical Assets* and currently edits other ASA publications, including the ARM and MTS journals.

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