

Valuation of Other Assets ©

Objective: Most valuation seminars focus on the valuation of a closely-held business. This course is different; it will focus on the valuation of “other assets”, such as real estate, paintings, intangible assets, timberland, conservation easements, reversionary interests, litigation claims, and others. The valuation of other assets is important for many reasons including estate and gift taxes, divorce, and the sale of the asset.

Learning objectives:

- List the relevant valuation factors for each of the other assets discussed
- Explain the valuation methodologies used to value other assets
- Determine what discounts should be applied, if any
- Assess the credentials of the experts involved
- Explain the lessons that can be learned from key cases
- Point out the penalties that can be imposed on an improper valuation

CPE: 4 hours

Level: Overview

Category: Technical Consulting

Prerequisites: None

Instructor: Dennis J. Gerschick

Code: VOOA