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## **Southern California Chapter**

# **2016 SCCAI SUMMER CONFERENCE**

July 12, 2016  
Cerritos, California

### **8:00am – Welcome and Introductions**

Bob Dietrich, MAI – Summer Conference Co-Chair  
Russel Babbitz, MAI, SRA – 2016 SCCAI President  
Designation Presentation

### **8:10am**

#### **Expert Witness 101 – How Appraisers Can Work (Better) with Attorneys**

Litigation: Troy Martin, Esq. – Lurie, Zepeda, Schmalz, Hogan & Martin  
Trust & Estate Planning: Eric Bardwell, Esq. – Jeffer Mangels Butler & Mitchell LLP  
Real Estate Legal Considerations: Marc Benezra, Esq. – Baker Hostetler  
Moderator: Steven Hogan, Esq. – Lurie, Zepeda, Schmalz, Hogan & Martin

### **9:10 am Condo Development & Feasibility**

William J. Drewes, MAI – Valuation Services Director, Colliers International  
Michele Kauffman, MAI – Executive Director, Cushman & Wakefield  
Moderator: Casey Merrill, MAI – Colliers International

### **10:25 Morning Refreshment Break**

### **10:40am CHOICE OF BREAK OUT SESSIONS**

#### **Crowd Funding – “The Future in Commercial Real Estate Financing – Without an Appraisal!”**

Elizabeth Braman, CCIM – RealtyMogul.com.  
Gene Trowbridge, Esq., CCIM  
Ryan Grantio - Fundrise  
Moderator: Karim Jaude - Dynamics Capital Group  
Moderator: Eric Garfield, MAI, CCIM – Managing Director, Andersen Tax

**OR**

#### **The New and Improved MLS...TIPS AND TRICKS**

Miguel Ramos  
Moderator: Linda Whittlesey, SRA - Alliance Appraisals

### **11:55am – Lunch with Speakers**

Mike Belote, President / Lobbyist – California Advocates, Inc.  
Scott W. DiBiasio—Manager of State & Industry Affairs f  
or the nearly 20,000 member Appraisal Institute.  
Moderator: Charles Baker, SRA - Appraisal Pros.Com, Inc.

### **1:00pm – CHOICE OF BREAK OUT SESSIONS**

#### **Intangibles Asset Valuation**

Bob Dietrich, MAI, Senior Valuation Services Director, Colliers International  
Justin Glasser, MAI, Managing Director, Cushman & Wakefield – San Diego  
Moderator: Everett Allen Greer, MAI, AI-GRS - Greer Advisors, LLC

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### **Current Legal Issues Facing Real Estate Appraisers**

Scott Mahler, Esq. Partner - Garrett & Tully, P.C.

Moderator: Charles Baker, SRA - Appraisal Pros.Com, Inc.

### **2:20pm – CHOICE OF BREAK OUT SESSIONS**

#### **“Resilience by Design” and the Los Angeles Earthquake Retrofit Law**

Wayne Kalayjian, PE, CFE – Deloitte Advisory Los Angeles

David Funk, S. E. – Principal John Labib + Associates Structural Engineers

Moderator: Russel Babbitz, MAI, SRA – Sr. Real Estate Officer, LA County MTA

OR

#### **Appraising Proposed Residential Construction for Lenders**

Alex Gilbert, VP, Senior Residential Appraiser, California Bank & Trust

Moderator: Michelle Rogers, SRA, Chief Valuation Officer - New American Funding

### **3:20pm – afternoon Refreshment Break**

#### **3:35 pm Bankruptcy Panel**

Robert J. Miller, Esq. – Bryan Cave LLP

Richard Golubow, Esq. – founding member and the managing shareholder of Winthrop Couchot Professional Corporation.

Bob Dietrich, MAI – Senior Valuation Services Director, Colliers International

Moderator: Derrick J. Sinclair, MAI, CCIM, Senior Valuation Services Director, Colliers International

### **5:00pm – Concluding Remarks**

Everett Allen Greer, MAI, AI-GRS – Chair

Bryan Vick, MAI – Co Chair

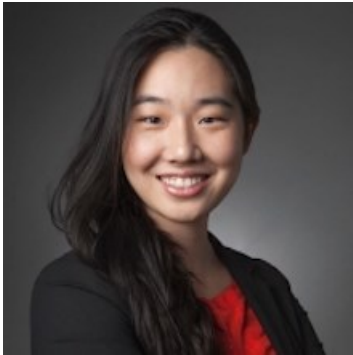


***William Drewes, MAI  
Colliers International  
Valuation Services Director | Greater LA***

William J. Drewes, MAI is a real estate appraiser and consultant. He is a California Certified General Appraiser (AG017131); Member of the Appraisal Institute (MAI); and approved HUD FHA and MAP appraiser. Mr. Drewes has a broad commercial appraisal and underwriting background. In addition to appraising conventional property sectors such as office, industrial, and retail, he specializes in conventional multifamily, Low Income Housing Tax Credit (LIHTC), HUD MAP program, FHA, condominium conversions, and construction loans. Mr. Drewes also has valuation experience in land subdivisions, mobile home parks, and golf courses.

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*Amy Wan, Esq. ,  
Partner  
Trowbridge Sidoti LLP*

**Amy Wan, Esq., CIPP/US** is Partner at Trowbridge Sidoti LLP (CrowdfundingLawyers.net), where she advises on syndication and crowdfunding law. Formerly, she was General Counsel at Patch of Land, a real estate marketplace lending platform. While there, Amy pioneered the industry's first payment dependent note that is secured pursuant to an indenture trustee and designed to be bankruptcy remote, and advised the company on its \$24.6M Series A funding round. She was recognized as a Finalist for the Corporate Counsel of the Year Award 2015 by LA Business Journal. Amy is also founder and co-organizer of Legal Hackers LA, and was named one of the one of ten women to watch in legal technology by the American Bar Association Journal in 2014.

Amy began her career as Presidential Management Fellow at the U.S. Department of Transportation, where she worked on U.S.-China transportation policy. She has also worked in enforcement and compliance at the U.S. Department of Commerce, where she represented the United States in delegations to the WTO and participated in free trade agreement negotiations on regulatory coherence and technical barriers to trade. Amy has also taught and spoken at SXSW, Practical Law Institute, and the American College of Mortgage Attorneys. She holds an LL.M. from the London School of Economics and Political Science, a JD from the University of Southern California Gould School of Law, and a BA from the University of Southern California.



*Bryan D. Vick, MAI  
President  
Bryan Vick & Associates*

Bryan D. Vick, MAI is owner and president of Bryan Vick & Associates, Inc. Mr. Vick is an independent contract fee appraiser with over 24 years of commercial real estate appraisal experience. The scope of his work experience is primarily appraisals and appraisal review. He has also performed due diligence, consulting and contract underwriting services during his career. He has performed these services for financial institutions, government agencies, insurance companies, pension funds, private individuals and investors. From 2003 to 2009, Mr. Vick held the position of Vice President/Appraisal Market Manager for Bank of America Commercial Appraisal Services, covering the Los Angeles, Ventura and Santa Barbara Markets. His responsibilities included appraisal procurement, review, fee panel management, and consultation with lending partners. Prior to that Mr. Vick worked as a commercial appraiser with the West Coast office of KTR Real Estate Services in Los Angeles. In the mid 1990s, Mr. Vick worked as a staff commercial appraiser at Bank of America Commercial Appraisal Group-Los Angeles. Mr. Vick is a graduate of Texas A&M University with a Bachelor's of Business Administration in Finance.

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***Troy Martin, Esq.***  
***Lurie, Zepeda, Schmalz, Hogan & Martin***

Troy Martin is an astute litigator who resolves clients' complex Trusts, Estates & Probate matters and Business disputes. His focused yet kind demeanor brings clients peace-of-mind during highly-contentious situations. Applying experience gained from handling a wide range of matters in federal and state courts, mediation and arbitration, Mr. Martin carefully reviews the merits of a case to establish a strategy, discussing the benefits of alternative approaches with his client.

Mr. Martin offers clients extensive experience resolving trust and estate disputes and probate litigation, and has achieved successful outcomes in matters ranging from \$300,000 to \$100 million. His noteworthy cases include taking advantage of favorable estate tax laws in late 2012, prior to the Fiscal Cliff, to negotiate settlements with an aggregate value exceeding \$60 million. Upon exploring deficiencies in the conservatorship laws in representing Peter Falk's and Casey Kasem's daughters, Mr. Martin drafted and lobbied for legislation to ensure a child's right to visit with an ailing parent. As a result of his efforts, he recently provided expert testimony before the **California State Assembly Committee on Judiciary**; has been quoted in the **Los Angeles Times**, **Washington Post** and **NBC Los Angeles**; and, has appeared on **CNN**, **Larry King Live**, **Inside Edition**, **Nancy Grace**, **Gurvey's Law** (KABC 790AM), and **The Tim Conway, Jr. Show** (KFI AM 640).

Mr. Martin's recent successes resolving business disputes include a verdict in client's favor after a month-long jury trial over the misappropriation of intellectual property and breach of employment contract for a manufacturer of tactical gear for the military and law enforcement. In a breach of contract case involving a real estate agreement entered in 1924 regarding the establishment of a local cemetery, he achieved a judgment in favor of clients for the total amount of requested damages. Other noteworthy cases involved construction of the Metro Red Line, manufacturing of fire extinguishers for the engine bay of FA-18 fighter jets, and the manufacturer of French fry vending machines.

***Linda Whittlesey, SRA***



Linda Whittlesey, SRA began her career appraising residential real estate in 2004. She is a past president of the Los Angeles Chapter of the California Association of Mortgage Professionals.

Currently, she serves both as a Region VII Representative for the Southern California Chapter of The Appraisal Institute and as an Advisor to Candidates for Designation.

Linda holds a Bachelor's degree in Communication from Northwestern University. In her free time, she enjoys serving as the Training Chairwoman for the Junior League of Pasadena as well as volunteering for the Pasadena Tournament of Roses.

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***Steve L. Hogan, Esq.***  
***Lurie, Zepeda, Schmalz, Hogan & Martin***

Steve Hogan is an accomplished litigator focused on resolving major Trusts, Estates & Probate Litigation and Business Litigation. Whether representing an individual, business owner or global corporation, Mr. Hogan strives to be accessible and responsive. He attributes his success on behalf of his clients to careful strategic planning with consideration to the parties involved, the potential costs of alternative approaches, the unique facts of the case, and case law precedent. Mr. Hogan's reputation, earned over 35 years, frequently results in the compliment of being hired by clients after other law firms failed to resolve their matters satisfactorily.

Mr. Hogan applies his deep experience as a litigator to successfully resolve heated, complex Trust, Estate & Probate Litigation. He prosecutes and defends claims for wealthy individuals, including celebrities and other lawyers, as well as professional and individual fiduciaries. Among his recent cases, Mr. Hogan tried and won a probate matter involving two competing wills in a \$50 million estate; settled a trust administration dispute in San Diego Superior Court for a young lady whose trustees and guardians had stolen nearly \$7 million from her trust after her parents both died of cancer; won a hotly-contested, 37-day elder abuse trial in probate court for a trustee against her two brothers who alleged she had stolen millions of dollars from their parents' trusts while parents were living, but purportedly incapacitated; and, after a three-day mediation in Washington, D.C. on behalf of a co-trustee/beneficiary, favorably resolved a complicated trust dispute involving three lawsuits in varying jurisdictions regarding management of real estate assets in Virginia.

Mr. Hogan has counseled and successfully defended major corporations in several mass tort, multi-jurisdictional cases. Of particular note, he was lead defense counsel for McDonnell Douglas Corporation in hundreds of lawsuits filed in multiple jurisdictions nationwide arising from the 1989 United Airlines DC-10 crash in Sioux City, Iowa in which 112 people died. In recent matters, he settled a shareholder dispute after two days in arbitration on terms favorable to his client against venture capitalists who had invested in client's business; and, after lengthy litigation, prevailed in trial to achieve a partition of real estate involving 110 tenants-in-common and the appointment of a receiver to sell the property.

***Derrick Sinclair, MAI, CCIM***  
***Senior Valuation Services Director***  
***Colliers International Valuation & Advisory Services***



Derrick Sinclair is a Senior Valuation Services Director with Colliers International Valuation & Advisory Services in the Irvine office. Mr. Sinclair is a member of the Appraisal Institute, the highest designation for commercial property appraisal. He has served twice as the President of the Southern Arizona Chapter of the Appraisal Institute and has served many years on that Board of Directors. He has performed valuations involving a wide variety of property types ranging from full service resort property to research parks. Areas of specialization include planned developments, subdivisions, leasehold/ leased fee analyses, and project modeling. He has appraised all types of commercial, industrial, and multi-family properties in the Western United States for more than 25 years. Mr. Sinclair is a recognized expert in valuing all types of real estate. He has been designated as an expert in real estate valuation issues in courts and has testified on several occasions.

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***Eric R. Bardwell, Esq.***  
***Jeffer Mangels Butler & Mitchell LLP***



Eric R. Bardwell is Of Counsel with the Orange County office and is a member of the Firm's Trusts and Estates department. Mr. Bardwell's practice focuses on all aspects of wealth transfer planning, including estate planning, charitable planning, business succession planning and post-death administration.

Mr. Bardwell routinely assists individuals and families in efficiently minimizing estate, gift and generation-skipping transfer taxes through the creation of wills, trusts, business entities and charitable organizations and the use of gifts, sales and other wealth-transfer strategies. He works closely with each client's team of advisors, including accountants, investment advisors and insurance agents, to ensure the client's personal planning and wealth preservation goals are accomplished in a coordinated manner. In addition, he advises clients on estate and trust administration, probate administration and the preparation of gift and estate tax returns. Mr. Bardwell has been designated as a Certified Specialist in Estate Planning, Trust & Probate law by the State Bar of California, Board of Legal Specialization.

In 2014, 2015 and again in 2016, Mr. Bardwell was named among the list of Southern California Rising Stars by *Super Lawyers Magazine*. Only 2.5% of the attorneys under age 40 in Southern California are selected for this honor.

While in law school, Mr. Bardwell served as a judicial extern to the Honorable Gary Allen Feess in the United States District Court for the Central District of California and as Literary Editor for the Pepperdine Journal of Business, Entrepreneurship & the Law.



***Robert Dietrich, CCIM, CRE, MAI, MRICS***  
***Senior Valuation Services Director***  
***Colliers International***

I have been active in valuation and consulting for over 30 years. I have also developed real estate including commercial, planned development and subdivision properties. Work experience before Colliers includes KPMG, Navigant, FMV Opinions, Millennium Advisors, and Burke Hansen.

Served as President of the Southern California CCIM Chapter and Southern California Chapter of the Appraisal Institute. Was awarded the Appraisal Institute Volunteer of Distinction in 2012. Served as The Chair of Region VII in the Appraisal Institute and sat on their Board of Directors for three years.



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***Marc Benezra, Esq.***  
***Baker Hostetler***

Marc Benezra represents public and private entities in commercial matters. Classically trained as a real estate transactional lawyer, his practice emphasizes real estate and real estate financing, including workouts and restructurings. Marc has become an authority in defending solvent guarantors in connection with distressed assets/loans, and has most recently pursued overly aggressive special servicers, supervising and developing strategies in these areas. He is committed and sensitive to his clients' unique situations and needs

## **Select Experience**

- Successfully represented approximately 30 commercial real estate loan guarantors in resolving numerous matters involving eight-figure exposures. In one case, resolved a more than \$20 million guaranty litigation for a walk-away.
- Represented commercial real estate owner against conduit lender and overly aggressive special servicer in connection with a more than \$20 million loan. Among other things, sought TRO in connection with attempted foreclosure and filed bankruptcy involving a proposed "cramdown."
- Represented seller in \$400 million roll-up of medical supply distributors to private equity group.

***Michele Kauffman, MAI***  
***Executive Director***  
***Cushman & Wakefield***



Ms. Kauffman joined the Los Angeles office of Cushman & Wakefield Western, Inc., in 1999. Prior to joining Cushman & Wakefield, Ms. Kauffman was with EDAW where she was a Land Use Planner. She worked with a range of private developers and public agencies on securing approvals for a number of significant projects in and around Washington D.C.

Ms. Kauffman is an Executive Director in the Valuation & Advisory group and is a co-leader of the Valuation & Advisory Multifamily Practice Group. Based in Los Angeles, the central focus of her work is the valuation of development sites and residential and special purpose properties. Ms. Kauffman specializes in projects with unique land planning and entitlement issues. She also advises clients on highest and best use issues and prepares market studies and feasibility analysis for land investment opportunities. Her focus is on urban infill development in Southern California.

Central to her practice is the valuation of Low Income Housing, New Market and Historic Preservation Tax Credits, bond financed properties, affordable housing, SROs and student housing. She has a keen understanding of the public/private partnership structures that are used to facilitate urban development and has appraised leased fee and leasehold positions in multiple ground leased assets throughout Los Angeles.

Ms. Kauffman has provided consulting and/or valuation services for clients with substantial holdings including the U.S. General Services Administration, State of California, local governments, publicly traded REITs, pension funds, private partnerships, local developers and family trusts.

# Lunch Speakers



***Mike Belote***  
***President / Lobbyist***  
***California Advocates, Inc.***

Michael Belote President, has over 30 years experience in representing a variety of clients before the Legislature and state regulators. Before joining California Advocates, Mike worked as a legislative advocate for the California Society of Certified Public Accountants followed by the California Association of Realtors. He has also served as Vice President and Legislative Counsel for the California Land Title Association.

Mike's activities in the legislative process have spanned a broad array of issues, including financial services, real estate, health care, the judiciary, and local government. He has been involved in such diverse endeavors as creating new occupational licensing laws, fostering economic development, shaping state tax policy and influencing the budget process.

Mike is a graduate of the University of California at Berkeley and the McGeorge School of Law. He is admitted to practice before the state and federal courts in California.



***Scott W. DiBiasio***  
***Manager of State & Industry Affairs***  
***Appraisal Institute***

Scott W. DiBiasio is the Manager of State & Industry Affairs for the 21,000 member Appraisal Institute. Based in the real estate appraiser trade association's Washington, D.C. office, Scott is responsible for tracking state legislative and regulatory issues affecting the real estate appraisal profession across the country. Scott is also responsible for tracking and working to influence state legislative proposals regarding background checks, appraisal review licensing requirements, and alternate valuation standards. Scott also works with the leaders and members of the Institute's 89 chapters



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***Charles Baker, SRA***  
***Appraisal Pros.Com, Inc.***

Established in 1988 by Charles Baker, SRA, AppraisalPros provides appraisal and consulting services on residential property throughout the Southern California area, including Avalon, Catalina Island.

Clients include domestic and international financial institutions, law firms, consulting firms, developers, employee relocation companies, condo boards, real estate firms and individuals.

Charles Baker, SRA is an established appraiser for high-value, custom, architecturally significant and historic residential property in areas such as Pasadena, San Marino, Beverly Hills, Hidden Hills, Calabasas, Malibu, Hancock Park, Los Feliz, Hollywood, Bel Air, Santa Monica, Brentwood, Pacific Palisades and central Los Angeles. In addition, he has appraised high-value homes in most San Fernando Valley communities, eastern Ventura County, the South Bay and the San Gabriel Valley, including over 40 appraisals in Avalon, Catalina over the past ten years.

Mr. Baker has appraised the homes of countless celebrities and who's-who in the finance, design, business, entertainment, legal, sports, health care and professional realm with over \$15 billion in aggregate residential valuations since 2002. He recently appraised one of the largest and most expensive homes in Southern California, Chateau de Flores, and the most opulent, Hacienda de la Paz.

In the 1990's and early 2000's Mr. Baker served as Senior Review Appraiser for three national mortgage quality management companies and conducted thousands of field and desk review appraisals. He has testified in LA Superior Court and received commendation from the trial judge and attorneys.

Architectural experience includes homes by the masters Greene & Greene, Frank Lloyd Wright, Wallace Neff, Marston & Van Pelt, Myron Hunt, Elmer Gray, Ricardo Legoretto, Gerard Colcord, Paul Williams, Quincy Jones, Richard Neutra, John Lautner, Rudolf Schindler, Gregory Ain, John Finton, Ron Firestone, Charles Hefner, and others.

Charles holds the SRA designation from the Appraisal Institute and serves on the Board of Directors of the Southern California Chapter, the largest in the nation. He has been a speaker at seminars and events with the Chapter and conducts architectural home tours.



***Alex Gilbert, VP***  
***Senior Residential Appraiser***  
***California Bank & Trust***

Alex Gilbert, VP, Senior Residential Appraiser, California Bank & Trust. Mr. Gilbert is a California certified residential appraiser currently managing the residential appraisal process for California Bank & Trust. Prior to transitioning into appraisal management, he worked as a staff appraiser for Bank of America, Citibank and Bay View Bank in the SF Bay Area. Alex is an AQB certified USPAP instructor and has been teaching appraisal courses since 1998.

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### Talk to the Liability Insurance Specialists for the Appraisal Industry

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No one can be perfect all the time and unfortunately in today's society you don't have to do anything wrong to be sued. A strong defense is important. Here at LIA Administrators & Insurance Services, we pride ourselves on providing quality Errors & Omissions, General Liability and Bonds for Appraisers and other Real Estate Professionals.

- ▶ Peter Christensen, LIA's General Counsel, presents nationwide liability prevention seminars and provides written publications on liability prevention.
- ▶ Claudia Gaglione, LIA's National Claims Counsel, has managed LIA-backed appraisers through more than **7,500 claims**.
- ▶ We offer free pre-claim assistance, FDIC & regulatory agency claim coverage, no fees, mold claim coverage and broad definition of insured
- ▶ 280,000+ policies issued since 1987
- ▶ 350+ years of combined experience

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***Casey Merrill, MAI, ASA, FRICS***  
***Executive Managing Director | Southwest Region***  
***Colliers International***



Casey Merrill is the Managing Director of Southern California for Colliers International Valuation & Advisory Services. Casey has successfully served as an appraisal leader and manager for more than 20 years. Casey has performed valuations and consulting services on a wide variety of property types and property rights across the United States. Casey has specialized expertise in mortgage lending, condemnation (right-of-way), easements, going concerns, life estates, land leases, minority and fractional interests, valuation of Tribal and Allotted Land on Indian Reservations, estate and probate appraisal. Casey has served as an expert witness in Superior Court, Federal Bankruptcy Court, and at Assessment Appeals Board Hearings.

### **Accomplishments**

NFL Player for 8 seasons. Team Leader on the Green Bay Packers and New York Giants Chief Appraiser for the Agua Caliente Band of Cahuilla Indians Vice President & Appraisal Manager, Wells Fargo Bank Owner, Manager, Chief Appraiser - Merrill Appraisal Managing Director - Los Angeles, Ontario & Hawaii, CBRE Appraisal Institute - Member Regional Ethics and Counseling Committee Appraisal Institute - Vice Chairman, Admissions Committee, Southern California Chapter Royal Institution of Chartered Surveyors - Board of Directors, Southern California Chapter

### **Expertise**

Valuation and Advisory Services, Consultancy Services, Ground lease, Retail, Office, Industrial and Logistics



***Elizabeth Braman, CCIM***  
***Chief Production Officer***  
***RealtyMogul.com***

Elizabeth is the Chief Production Officer at RealtyMogul.com. She is an award-winning finance executive and CCIM with more than 15 years of experience in commercial real estate. Elizabeth is responsible for procuring new products, as well as bringing new equity and debt investment opportunities to the platform. Previously she was with ReadyCap Commercial, where she headed originations for a national small balance commercial real estate platform. Elizabeth earned her JD and MBA from George Washington University.



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***Ryan Granito***  
***Vice President of Real Estate***  
***Fundrise***



Ryan is Vice President of Real Estate for Fundrise and is based in Los Angeles and San Diego, CA. Ryan is focused on developing relationships with local developers and property owners to expand the company's presence on the west coast.

Ryan has broad industry experience ranging from acquisitions and dispositions to development and construction management, having worked in both private and public sectors throughout his career.

Prior to joining Fundrise, Ryan led entitlements, design, and financing efforts for Beverly Hills based Bolour Associates. At Bolour, Ryan managed the development of mixed-use projects ranging from \$20MM - \$150MM in total costs, focusing on urban infill sites in Downtown Los Angeles. Prior to Bolour, Ryan held development positions with the San Diego Housing Commission, Sares-Regis Group, and Lennar.

A California native, Ryan lives in Los Angeles with his wife Lisa, daughter Sydney and son Charlie.



***Justin Glasser, MAI***  
***Managing Director***  
***Cushman & Wakefield***

Justin Glasser is a Senior Director and West Region Leader of the Financial Reporting Practice within the Valuation & Advisory (V&A) Group at Cushman & Wakefield. The Financial Reporting Practice is a specialty practice within V&A focusing on engagements involving real estate related consulting services, with a primary focus on valuation for financial reporting (GAAP & IFRS), including fair value measurements (ASC Topic 820), purchase price allocations (ASC Topic 805), capital leases (ASC Topic 840), and reorganizations (ASC Topic 852).

Mr. Glasser joined the San Diego office of Cushman & Wakefield in 2015. Prior to joining Cushman & Wakefield, Mr. Glasser held a senior management position in the real estate valuation practice of KPMG LLP, where he consulted with real estate clients in a variety of industries, including hospitality, healthcare, retail, residential development, manufacturing, and financial services.



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***Eric Garfield, MAI, CCIM***  
***Managing Director***  
***Andersen Tax***

Eric Garfield entered the field of commercial real estate in the early 1990s and is licensed in several U.S. States as a Certified General Appraiser, including California and Florida. As part of Andersen Tax's Valuation Services Group, Eric performs valuation analysis and consulting assignments for estate planning, estate tax, financial reporting (ASC Topics 805, 350, 360 and 820), bankruptcy, ad valorem, litigation support and financing. His clientele includes attorneys, accountants, lenders, trust officers and developers.

Eric has extensive valuation experience on an array of property types including Conservation Easements, Class A office buildings, industrial buildings, sports arenas, skilled-nursing facilities, assisted-living facilities, shopping centers, hotels, subdivision land and undeveloped land. Eric has testified in depositions and has qualified as an appraiser suitable for Charitable Contribution valuation.

In 2010, Mr. Garfield served as the Southern California Chapter of the Appraisal Institute's Education Director and was the 2010-11 President of the Beverly Hills Estate Planning Council. He is the Co-Chairman of the Southern California Chapter of the Appraisal Institute's IRS Valuation Summit.

Prior to joining Andersen Tax, Mr. Garfield served five years as a Vice President with FMV Opinions, five years as a Supervising Senior Consultant of the Forensic Real Estate practice for KPMG, and two years as a broker with a firm located in Southern California that specializes in real estate sales of commercial properties.

In 2009, Mr. Garfield co-authored an article entitled, "Cap Rate Calculations: How Do Investors Determine ROI in an Unsteady Market?" that was published by CIRE Magazine (CCIM). In 2013, he authored a follow-up article for the same publication, "Cap Rate Calculations Today: Lenders and Investors see ROI Differently."

Eric holds four designations, including: Member of the Appraisal Institute (MAI), Certified Commercial Investment Member (CCIM), Fellow, Royal Institution of Chartered Surveyors (inactive), and Society of Trust and Estate Planners (TEP). He is a member of the Water Buffalo Club (Men's Charity).

***Robert J. Miller, Esq.***  
***Partner***  
***Bryan Cave LLP***

Robert J. Miller Partner, Bryan Cave LLP. A partner in the firm's bankruptcy, restructuring, and creditors' rights practice group, in addition to the financial services, commercial litigation, and private equity practice groups. Central Michigan University (B.S., 1982); University of Oklahoma (M.B.A., 1986; J.D., with highest honors, 1990). Mr. Miller's practice concentrates on commercial workouts, Chapter 11 restructurings, and all aspects of commercial bankruptcy litigation. While Mr. Miller resides in the Phoenix, Arizona office of the Firm, he practices regionally and nationally (and periodically internationally) representing clients of the Firm. His practice group is well-known for representing senior secured creditors. He also regularly represents debtors, operating trustees, and buyers in distressed business situations. He is a frequent lecturer and author on a wide range of commercial insolvency topics. He is a member of the American Bar Association, the American Bankruptcy Institute, and the Turnaround Management Association. Mr. Miller is a contributing editor to *Norton Bankruptcy Law and Practice*, and a number of other publications.

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***Everett Allen Greer, MAI, AI-GRS, FRICS***  
***Managing Member***  
***Greer Advisors, LLC***

Everett (Allen) Greer is the managing member of Greer Advisors, LLC. He is a national authority on real estate valuation, risk assessment, real estate data/information systems and regulations for appraisal and real estate lending. He has spoken across the country before numerous real estate conferences, organizations, brokerage firms and other meetings, including the Los Angeles and San Francisco Federal Reserve Boards, Lee & Associates, CBRE, Grubb & Ellis, Charles Dunn, SIOR, CCIM, CREW, AIR, MBA, RMA, Appraisal Institute, ASA, IRWA, and accounting and attorney organizations. Since forming Greer Advisors in 2009, he has also spoken nearly two dozen times as an outside real estate economist for Bank of America, and once spoke before the 4th grade math class at Rossmoor Elementary School on the topic of “The History of Banking.” He is often quoted in newspapers and journals.

Mr. Greer’s lectures typically cover commercial real estate and the capital markets (i.e. CMBS, REITs, and derivatives), property valuation, automated valuation modeling, model validation, risk rating / indexing techniques, regulatory requirements for financial institutions related to commercial real estate lending / appraisal, and a variety of real estate topics. During his career, Mr. Greer has been involved in nearly every aspect of commercial real estate, including land acquisition, construction, development, leasing, sale, appraisal, lending and securitization.



***Scott Mahler, Esq.***  
***Partner***  
***Garrett & Tully, P.C.***

Scott Mahler is a partner with Garrett & Tully, P.C. Mr. Mahler is an experienced litigator and trial attorney whose practice focuses on business litigation, real estate litigation, and professional liability. He has successfully represented clients at trial and binding arbitration. He also handles appellate matters, including successfully petitioning the California Supreme Court for review. Mr. Mahler frequently represents title insurance companies, title and escrow companies, lenders, accountants, attorneys, and real estate appraisers. Mr. Mahler has litigated hundreds of matters regarding a variety of issues, including business disputes, real estate disputes, lender issues, title insurance coverage, escrow liability, insurance bad faith, attorney malpractice, accountant malpractice, and real estate appraiser malpractice.

Mr. Mahler is a frequent speaker and panelist for various professional organizations. In the past, he has served as a lecturer for the Los Angeles County Bar Association, California Land Title Association, Escrow Institute of California, regional chapters of the California Escrow Association, and the Appraisal Institute.

Mr. Mahler graduated from Loyola Law School, where he was the recipient of both the American Jurisprudence Award and First Honors Award in Negotiations, as well as a member of the Entertainment Law Journal. Prior to law school, he graduated from the University of California, Los Angeles, where he was the recipient of a UCLA Alumni Scholarship.



# 2016 SCCAI SUMMER CONFERENCE

## JULY 12, 2016

***Richard H. Golubow, Esq.  
Founding Member & Managing Shareholder  
Winthrop Couchot Professional Corporation***



Richard H. Golubow is a founding member and the managing shareholder of Winthrop Couchot Professional Corporation, a premier bankruptcy law firm established in 1995 and located in Newport Beach, California. Mr. Golubow devotes his practice to and has extensive experience in the areas of financial restructuring, insolvency law, complex bankruptcy and business reorganizations, liquidations, and litigation, out-of-court workouts, acquisitions and sales of distressed assets, Uniform Commercial Code Article 9 foreclosure sales, general assignments for the benefit of creditors, and receiverships.

Mr. Golubow has a diverse client base that includes representation of debtors, creditors, creditor committees, bankruptcy trustees, assignees for the benefit of creditors, receivers and asset purchasers in a wide range of industries, including retail, consulting, manufacturing, distribution, importing, construction, entertainment, education, religious and other non-profit institutions, fitness, financial services, healthcare, hospitality, financial services, real estate, automotive, agriculture, golf and country club, biotech, transportation, telecommunications and internet businesses, and multi-level marketing.

Mr. Golubow has been honored as the recipient of bankruptcy or financial restructuring attorney of the year awards by several leading international financial publications. He holds an “AV Preeminent” Peer Rating, Martindale-Hubbell’s highest peer recognition for legal ability and ethical standards and has been selected as a “Super Lawyer”, representing the top 5 percent of practicing attorneys in Southern California based on peer recognition and professional achievement. He is a member of the International Network of Boutique Law Firms (INBLF), an invitation only network of lawyers from single-discipline boutique law firms with the highest level of knowledge, experience, reputation and credentials comparable or superior to what can be found at the highest-ranking full-service law firms.

Mr. Golubow is a frequent speaker, panelist, moderator and author on a wide range of bankruptcy and financial restructuring topics for several professional organizations and publications including the American Bankruptcy Institute, the California Bankruptcy Institute, the California Receivers Forum, Financier Worldwide Magazine and Corporate LiveWire Magazine.

Mr. Golubow served as judicial law clerk and judicial extern to the Honorable John J. Wilson, United States Bankruptcy Judge in the Central District of California, Santa Ana Division.

Born and raised in Brooklyn, New York, Mr. Golubow is a graduate of the State University of New York at Albany, Albany, New York (B.S., *Cum Laude*, 1985) and Southwestern University School of Law, Los Angeles, California (J.D., 1992).

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JULY 12, 2016



***Wayne Kalayjian, PE, SE, CFE***  
***Senior Manager, Capital Project Services***  
***Deloitte Financial Advisory Services, LLP***

His expertise includes program management and controls, fraud investigations, forensic accounting, litigation support, and expert testimony. Wayne is also a licensed Civil and Structural Engineer in several states, with expertise in seismic analysis and building retrofit design.

Wayne holds a: Bachelor's degree in civil and environmental engineering, with honors, from Tufts University; Master's degree in structural and earthquake engineering from Stanford University; Master's degree in business management from MIT. Wayne is a: Certified Fraud Examiner; Technical Expert for the California Department of Consumer Affairs; Lecturer at USC's Viterbi School of Engineering. Wayne has provided expert testimony in several State and Federal courts across the United States.



***David Funk, S.E.***  
***Principal***  
***John Labib & Associates***

Mr. Funk has been involved in a wide variety of projects including residential, adaptive reuse, seismic retrofit, new commercial, high and low rise residential, and design-build government projects. Mr. Funk is responsible for structural concepts, structural design, coordination, and construction supervision within John Labib + Associates. Mr. Funk has over 13 years of engineering experience, and has completed projects with innovative design concepts including non-linear analysis and historic structure analyses and seismic mitigations. David won a 2008 Excellence in Structural Engineering Award from the Structural Engineers Association of California for the seismic retrofit of the Historic Metro 417 building in downtown Los Angeles.

#### **Education**

B.S./ Civil Engineering(Structural Design Emphasis) /University of Southern California

#### **Professional Licenses**

Registered Structural Engineer, California, Nebraska, Nevada

Registered Professional Engineer, California (plus 4 other states)



***Russel Babbitz, MAI, SRA***  
***2016 SCCAI President***

***Senior Real Estate Officer***  
***Los Angeles County Metropolitan Transportation Authority***

## 2016 SCCAI SUMMER CONFERENCE

JULY 12, 2016



***Karim Jaude***  
***CEO and President***  
***Dynamics Capital Group***

Karim founded and operated 19 successful companies in eight countries. He made his first million by the age of 26 by buying and fixing distressed properties and businesses.

For over 40 years Karim has developed, invested in, financed, brokered, managed and consulted in real estate properties in 8 countries.

These properties have ranged from single family homes to condo projects and apartment buildings, from shopping centers to offices, and industrial buildings--from hotels to land, and mixed use properties.

He has built from scratch, remodeled, fixed up, and converted properties for different uses in order to maximize the return on investments. In 1984 he was the first to convert an industrial building in downtown Los Angeles into artist lofts.

His offices have handled over twenty billion dollars in real estate transactions.

Karim writes, teaches, and speaks about real estate frequently. He has been published in over 116 business and real estate publications nationwide. As well as 62 newsletters.

In addition, we hold frequent Real Estate seminars and Syndication/Crowdfunding Conferences with various topics and speakers.

Karim is the author of the best seller book "The Smart Real Estate Investors 'Guide: Your Guide to Create Wealth In Any Economy."

Karim enjoys reading, tennis, skiing, traveling and is passionate about helping others. Most importantly, for over 40 years, Karim has committed and never failed to help at least one person every single day.



Miguel Ramos has over 20 years of experience within the Real Estate industry.

He is passionate about teaching and he has been a witness to the evolutions of our MLS System. California Regional MLS

**2016 SCCAI SUMMER CONFERENCE**  
**JULY 12, 2016**

***Michelle Bailey Rogers, SRA***  
***Chief Valuation Officer***  
***New American Funding***



Michelle has been a certified residential appraiser since 1992. Michelle's 18 years in the field working directly for American Savings Bank, Washington Mutual Bank and Corelogic. Michelle also completed research with the principles at Bell, Anderson and Sanders, specializing in damage real estate valuation. In 2010, she joined the Fannie Mae Forensic review team at Interthinx under the direction of Vicky Gill, SRA.

Michelle is now the Chief Valuation Officer at New American Funding. With her current position, she works daily in accordance with regulations of Fannie Mae, Freddie Mae, FHA, and additional investors for the purpose of rep and warrant valuation.

Michelle has been a member of the Appraisal Institute since 1992 and obtained her SRA in 2010. She has served in several capacities with the Southern California Chapter, Regional and National branches.

