

CURRICULUM VITAE

Amy J. Burkert, CPA/ABV, CFA

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Present Position

Burkert Valuation Advisors, LLC
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Co-founder of firm specializing in business valuations of privately-held companies for income/gift/estate tax planning, purchase/sale transactions, financial statement reporting, intellectual property, and marital dissolution proceedings and in litigation support for partner/shareholder disputes and damage/economic loss matters.

Education

B.S. Accounting, 1995, Marquette University, Milwaukee, Wisconsin.

Previous Employment

2000 to 2002	Murray Devine & Company, Philadelphia, Pennsylvania. Senior associate for a regional valuation and financial services firm.
2000 to 2000	Howard Lawson & Company, Philadelphia, Pennsylvania. Valuation analyst for local investment banking firm.
1999 to 2000	Mueller & Company, St. Charles, Illinois. Tax manager and consultant for regional public accounting firm.
1995 to 1999	Deloitte & Touche, LLP, Chicago, Illinois. Senior tax consultant for national public accounting firm.

Professional Designations

Certified Public Accountant (CPA) – State of Illinois, 1995.
Accredited in Business Valuation (ABV) – American Institute of Certified Public Accountants, 2002.
Chartered Financial Analyst (CFA) – CFA Institute, 2003.

Professional Associations and Awards

Director of Philadelphia Estate Planning Council
Member of Philadelphia Estate Planning Council Social Committee
Member of CFA Institute
Member of Financial Analysts of Philadelphia
Member of American Institutes of Certified Public Accountants
Member of AICPA Forensic and Valuation Services Section
Recipient of National Association of Certified Valuation Analysts' *Instructor of Exceptional Distinction* award in 2007

Professional Business Valuation Seminars/Conferences Attended

Six (6) national/regional business valuation conferences since 2000 sponsored by the American Institute of Certified Public Accountants, the American Society of Appraisers, and the National Association of Certified Valuation Analysts.

Business Valuation & Litigation Support Continuing Professional Education Courses

Over thirty (30) different continuing professional education courses since 2000 on specific business valuation and litigation support topics covering basic and advanced theory, specific industries and entities, and asset groupings and instruments.

Articles, Publications, and Presentations

“Check with IRS for latest rules on gift taxes”, St. Charles, IL, February 2000.

Instructor – Pennsylvania Institute of Certified Public Accountants

- Instructor for course on “Determining the Value of a Business or Firm for Purchase or Sale”, 2002. Two (2) one-day sessions taught since 2003.
- Co-author and instructor for course on “IRC Chapter 14 – Understanding Family Controlled Business Valuation”, 2003 One (1) one-day session taught in 2003.

“Impact of Regulatory and Accounting Changes on Value and Valuation”, Blank Rome, LLP Emerging Business Group, December 15,2003.

Instructor – National Association of Certified Valuation Analysts

- Co-author and instructor for Intellectual Property Workshop, 2006. One (1) session taught in 2006 and two (2) sessions taught in 2007.