

CFO STUDY GROUP

BY INVITATION ONLY

CFOs and financial professionals are invited to attend this complimentary event hosted by Swenson Advisors. This is a quarterly lunch series established to deliver forward-thinking perspectives, fresh insights and networking among CFOs and Financial Executives. The CFO Study Group provides a forum to hear from speakers on topics relevant to CFOs while enjoying stunning views and lunch at the University Club Atop Symphony Towers.



Tuesday, April 28, 2015
University Club Atop Symphony Towers
11:30am—1:30pm

FEATURED TOPIC:

Thinking Sensibly About Value

Founders and management sometimes present forecasts for their companies that may seem aggressive. There is a line between aggressive and nonsensical expectations. We will explore the best practices used to test forecasts (and valuations) for sensibility and demonstrate their use in analyzing start-ups and some of the hotter IPOs to hit the market in the last year.

AT THIS CFO STUDY GROUP, YOU WILL:

- Identify the demographic of your customer and learn how to measure it
- Learn how to be realistic about the effect of competition on profit margins
- Gain an understanding on how not to confuse an orange with an Apple™

FEATURED SPEAKER:

Ken Nunes, CFA | Managing Partner | Caliber Advisors

Ken Nunes founded Caliber Advisors, Inc., in 1990 and today maintains the technical vision, quality and responsiveness of the firm as president and managing director. He has over 25 years of experience advising companies on financial, valuation and dispute-resolution issues.

Mr. Nunes performs valuations and provides transaction advisory services for mergers and acquisitions, divestitures, financial statement reporting, transfer pricing agreements, corporate reorganizations, strategic planning, estate and gift tax purposes, corporate tax planning and purchase price allocations. He has testified as an expert witness in valuation in United States district, tax and bankruptcy courts, and in California state superior court.

Ken received his MBA from the University of California, Los Angeles with high honors in 1985. He graduated first-of-class at University of California, Davis, with a MS in mechanical engineering in 1981.



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