

Expert Witness Workshop & Mock Trial

Houston, November 5, 2021

Mock Trial Expert Witnesses

James Herr ASA, CFA, CPA/ABV, CEIV



James Herr is a Senior Director with Alvarez & Marsal Valuation Services in Houston. Mr. Herr has provided valuation and financial modeling consulting services for more than 20 years. During that time he has performed hundreds of valuation engagements, ranging from business and asset valuations (tangible and intangible); financial instrument valuations; tax valuations; valuations for transaction and strategic planning support; valuation and economic damage analyses in litigation; and fairness and solvency opinions.



HoustonAppraisers.org

He has over twelve years of specialty focus in the Energy and Mining Sectors. In the Energy Sector he has performed valuations for companies in the exploration & production, midstream (including MLPs), oilfield service, downstream (oil refineries and petrochemical plants), and petroleum product distribution sub-sectors. In the Mining Sector he has worked on valuations and financial models related to commodities such as: gold, coal (thermal and coking), lithium, platinum, nickel, aluminum/bauxite, trona, copper, iron ore, steel, titanium, potash, uranium, rare earth minerals, and zinc. James has also performed numerous valuations in the technology, telecommunications, and healthcare industries.

James has considerable experience in financial modeling, as a former leader of an international Big 4 model practice, building and reviewing client-based Excel models for a variety of purposes. He has also led basic and advanced financial modeling courses out of London and Moscow.

James earned his Bachelor of Arts degree (Magna Cum Laude) in both Economics and Russian from Brigham Young University, his Master of Arts in Economics degree from the University of California at Berkeley, and a Master of Business Administration degree from California State University at East Bay. He is a Chartered Financial Analyst charterholder, an Accredited Senior Appraiser with the American Society of Appraisers, a Certified Public Accountant in the state of Texas, and holds both the Accredited in Business Valuation and Certified in Entity and Intangible Valuations credentials.

Ola Fazoranti, CFE



Ola Fazoranti has over eight years of experience overseeing and executing a variety of engagements related to complex contract disputes, economic damages, valuation disputes and investigations. During his career, Mr. Fazoranti has assisted companies, partnerships, legal counsels and other entities with their economic, financial and dispute-related issues.

Mr. Fazoranti has evaluated, analyzed and quantified economic damages in a variety of complex business disputes which have involved claims for lost profits, disgorgement of profits, unjust enrichment, lost earnings, punitive

damages, and intellectual property disputes. Additionally, Mr. Fazoranti has worked on corporate, and SEC directed investigations related to fraud, revenue recognition issues, misappropriation of assets, FCPA violations and anti-money laundering investigations related to FDIC and OCC consent orders.

Mr. Fazoranti has worked on engagements of varying sizes with damage claims ranging from millions to billions of dollars, both domestically and internationally, and his clients have ranged from publicly traded entities to private entities in a broad range of industries, including financial services, life sciences, manufacturing, real estate, technology and healthcare.

Prior to joining BVA, Mr. Fazoranti was a Manager in the Forensic & Integrity Services group at Ernst and Young, LLP where he focused on dispute advisory and investigations.

Mr. Fazoranti received a Master's in Finance from Claremont McKenna College. In addition, he received a Bachelor of Science in Mathematics and Bachelor of Arts in Economics from Washington and Lee University. He is a Certified Fraud Examiner and is a member of the Association of Certified Fraud Examiners.

Alvin Stern, AM

A numismatist since 1966, **Al Stern** has been affiliated with the American Society of Appraisers for more than 35 years. He has a long history conducting research and producing educational programs and videos. A member of the American Numismatic Association (ANA) he has five video presentations in their education library. Al has published numerous articles in his field and received the Bradford Literary Award-CSNS in 2007. He hosts the "Texas Numismatic Study Group" in Houston every month and routinely works as an expert witness, prepares appraisals for various departments of the U.S, government, law offices, churches, and family estates.



Barbara Blades-Lines, ASA, ISA-CAPP

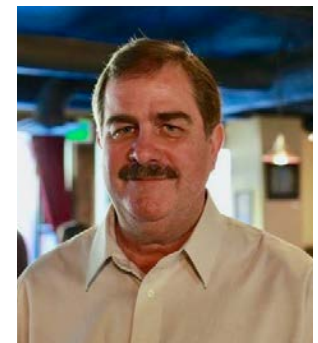


Barbara Blades-Lines has appraised Colonial to Contemporary furniture, paintings, silver, glass, ceramics, and maps, and promoted emerging artists, public art, and art education. A native Houstonian, Barbara graduated from the University of Texas and completed postgraduate studies with Christie's Education in London. Pursuing a career as an independent appraiser, Barbara founded Blades Appraisal Services in 1994 in Houston. She moved to Bermuda in 1996, continuing her practice there until 2012. She returned to Houston and joined the appraisal department at MKG Art Management, LLC, serving as Director of Deaccessions. In 2019 Barbara founded Blades Appraisal and Art Resources, LLC where she serves private,

corporate, and institutional clients. Barbara also serves as the Secretary of the Houston Chapter of ASA.

Jeffrey Hays, ASA

Jeffrey Hays graduated from Rice University in 1978 after earning a degree in Economics and entered the local real estate industry the same year. Jeff is a member of the Houston Association of Realtors, is a licensed Texas Real Estate Broker, is a State Certified Residential Real Estate Appraiser and senior member of the American Society of Appraisers with ASA designation in Real Property. "Unconventional Wisdom" describes the independent thinking he and his company provide for a variety of individuals, estates, trusts, and institutions.



Jeff was born in the Rio Grande Valley and moved to Houston at an early age living in West University Place and Meyerland before his family relocated to Walnut Creek, California. Upon

returning to Houston, they settled in the Memorial area along Buffalo Bayou in west Houston where Jeff graduated from Westchester High School. After attending Rice University, he was a resident of the Heights area for many years buying his first home at age 23 in Norhill. Later he returned to Memorial in the 1990's. Jeff enjoys sports and is an avid supporter of Rice University Athletics. He earned four Letters in baseball while attending Rice.

Jeff Hays has much experience in and knowledge about close-in neighborhoods and has a working knowledge of many suburban communities. Today, his firm primarily involved in the appraisal of high value homes in Houston neighborhoods of River Oaks, Memorial, West University, Tanglewood, and the Heights. He keeps up to date on growth and development trends shaping real estate markets and life across the greater Houston area and beyond. Urban economics including sustainable development and architecture are ongoing interest. He is currently a member of the HAR MLS Advisory Group.

REGISTER TODAY!

One Day Event, Nov. 5, 2021, 9 am-5:15 pm
includes Lunch and Networking Reception
8 hours credit: CE, MCLE #174138092, CFLC, MCFLC



**Mock Courtroom, 4900 Fournace Place, Bellaire, Texas 77401
In the Bellaire/Galleria area, inside Houston**