

RICHARD J. REESE, CFA, AVA

PROFESSIONAL BACKGROUND:

Richard Reese has over 20 years of professional experience including the valuation of public and private companies, investment portfolio management, and financial consulting.

His areas of practice include business valuation services for the purposes of mergers & acquisitions, shareholder disputes, owner buyouts, marital dissolutions, and estate and gift tax purposes. He provides expert consulting services to attorneys and their clients and renders transaction advisory services to middle market closely-held companies.

Prior to forming R.J. Reese & Co., Richard was an investment portfolio manager in the securities brokerage and investment banking industry with Robert W. Baird & Co., and Stifel Nicolaus & Co. Prior to that, he served in the institutional money management arm of one of the nation's largest banks. Before that, he served as a branch manager of a national employee benefits firm where he gained valuable experience working with institutional clients, investment boards, and plan sponsors.

Richard holds the Chartered Financial Analyst (CFA) designation from the CFA Institute and is an Accredited Valuation Analyst (AVA) with the National Association of Certified Valuation Analysts. He is a candidate for the Accredited Senior Appraiser (ASA) designation from the American Society of Appraisers. Richard holds a B.S. in Management from Cardinal Stritch College.

EDUCATION:

- Cardinal Stritch College, Bachelor of Science, Business Management
- Professional educational programs on business valuation, financial analysis, and security analysis

ACCREDITATION IN BUSINESS VALUATION:

- Accredited Valuation Analyst (AVA) of the National Association of Certified Valuation Analysts
- Chartered Financial Analyst (CFA) of the CFA Institute
- Candidate for the Accredited Senior Appraiser (ASA) designation of the American Society of Appraisers

PROFESSIONAL MEMBERSHIPS:

- American Society of Appraisers
- CFA Institute
- National Association of Certified Valuation Analysts
- Twin Cities Society of Security Analysts
- North Central Chapter of the Institute of Business Appraisers