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Senior Associate

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EDUCATION

University of Nebraska in Omaha, B.S., Business Administration, 2007

PROFESSIONAL DESIGNATIONS

Certified Fraud Examiner (CFE)

PROFESSIONAL AND COMMUNITY AFFILIATIONS

American Society of Appraisers

Association of Certified Fraud Examiners

Junior Achievement of Arizona

Habitat for Humanity - Central Arizona

BUSINESS HISTORY

Ringel Kotzin Valuation Services (Phoenix): Associate, Business Valuation and Litigation Support Services Group (2008-2009)

JPMorgan Chase (Scottsdale): Financial Advisor and Personal Banker (2007-2008)

Smith Barney (Omaha): Financial Advisor Internship (2006-2007)

RANGE OF EXPERIENCE

BUSINESS AND INTANGIBLE ASSET VALUATION

Conducted detailed financial and industry analyses to determine the value of closely held businesses, business units and intangible assets. Valuations included income-, market- and asset-based approaches

Performed business valuations for a variety of purposes, including marital dissolution, estate and gift taxes, financial reporting, buy-sell agreements, bankruptcy and reorganization proceedings, mergers and acquisitions, shareholder disputes and stock option issuance

Utilized Rueschenberg and Cockrill methodologies in the valuation of closely held businesses for the purposes of calculating excess net distributable earnings, reasonable compensation paid to the community, and active versus passive appreciation in business value

Performed extensive industry and competitor analysis across a broad spectrum of industries including health care, professional practices, convenience stores/service stations, fast-food franchising, personal care products, and real estate

Collaborated with business owners and their senior management teams to understand and identify unique company specific risks and business value drivers

Reviewed historical and projected financial statements and performed detailed financial analysis and complex modeling to assess business risks and key value drivers

Created discounted cash flow analyses and developed valuation multiples from publicly traded and recently acquired companies in order to determine and measure goodwill impairment as stipulated by Statement of Financial Accounting Standards No. 142, Goodwill and Other Intangible Assets

Analyzed projected cash flows from long-lived intangible assets in order to determine potential impairment loss pursuant to Statement of Financial Accounting Standards No. 144, Accounting for the Impairment or Disposal of Long-Lived Asset

LITIGATION SUPPORT AND FORENSIC ACCOUNTING

Reviewed opposing experts' reports and depositions for the purpose of preparing rebuttal reports and accompanying cross-examination questions

Prepared charts and exhibits used by legal counsel at trial

Traced and reviewed account activity among various business accounts, highlighting potential unusual activity

Reviewed financial records of various entities for purposes of analyzing and identifying fraudulent conveyance allegations and asset diversions

Traced cash receipts and disbursements and reconstructed accounting records and financial transactions for a variety of clients