

DAVID PEER, ASA

DIRECTOR ► ADVISORY SERVICES



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David Peer is a director in the Advisory Services practice. He has performed valuations of business interests for a variety of purposes including, but not limited to, family law matters, business damages, buy-sell agreements, shareholder litigation, estate and gift tax matters, buying and selling businesses, and employee stock ownership plans.

Professional & Civic Affiliations

American Society of Appraisers (ASA)

Princeton, New Jersey Chapter of the American Society of Appraisers

Presentations

Basic Business Valuation Issues, Burlington County Bar Association, Mt. Holly, NJ, September 2014

Case Overview: Estate of Marie J. Jensen v. Commissioner and Balicki v. Balicki, Connecticut Chapter of the

American Society of Appraisers, New Haven, CT, April 2011

Publications

The Use of Projected Financial Information in ESOP Valuations, Marcum ESOP Advisor, October 2018

Current Monetary Policy and Its Impact on the Values of Privately Held Companies, *MHP Newsletter*, January 2014

The Tax-Savings Benefits of Family Limited Partnerships, *MHP Newsletter*, June 2013

Latest Digital Technology Abets Age-Old Crimes, *Connecticut Law Tribune*, February 2012

Constructing a Reliable Buy-Sell Agreement, *MHP Newsletter*, October 2011

Analysis of Company Risk and the Impact on Capitalization Rates, *MHP Newsletter*, February 2011

A Business Appraisal's Role in Succession Planning, *MHP Newsletter*, May 2010

Surveying the Damages: Valuing Lost Profits and Loss of Business Presents Complexities, *Connecticut Law Tribune*, February 2010

Industry Consolidation and its Impact on a Company's Value, *MHP Newsletter* November 2009

Demand for Independent Fairness Opinions on the Rise, *MHP Newsletter*, June 2009

Business Valuations in Buy-Sell Agreements, *MHP Newsletter*, January 2009

The Valuation of Closely Held Businesses in a Bad Economy, *MHP Newsletter*, October 2008

Understanding the Discount for Lack of Marketability, *MHP Newsletter*, September 2008

Internal Revenue Code Section 409A - Be Aware! *MHP Newsletter*, June 2008

EXPERTISE

- Employee Stock Ownership Plans
- Business Valuation
- Intangible Asset Valuation
- Litigation Support
- Forensic Investigations

INDUSTRY FOCUS

- Business Owners
- Corporate Executives
- High-Net-Worth Individuals
- Law Firms

EDUCATION

- Master of Business Administration, Rochester Institute of Technology, 2006
- Bachelor of Arts in Economics & Political Science, Dickinson College, 2004

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