

Certified Art Appraiser and Advisor for Important Public and Private Collections of American Art

President and Founder: Art Appraisal Firm, LLC

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PUBLIC SPEAKER, WRITER AND ADVOCATE FOR:

- Professional personal property appraisal qualifications, standards and ethical practices
- Advancing transparency and diligent art collection and succession planning practices

PROFESSIONAL LEADERSHIP ROLES

- Past President: International Society of Appraisers (ISA)¹
- Chair: ISA Advanced and Specialty Studies Committee
- Board of Trustees: The Appraisal Foundation²

PROFESSIONAL QUALIFICATIONS:

- Certified Member³: International Society of Appraisers, (ISA) Fine Art Designation
- ISA Private Client Services Affiliation
- Trained, tested and in compliance with the qualifying and continuing education requirements of the Uniform Standards of Professional Appraisal Practice (USPAP), since 2000
- Exceeds Internal Revenue Service (IRS) Qualified Appraiser Criteria
- Recognized by Chubb Personal Insurance as a Masterpiece Protection Network preferred provider
- Exceeds the Personal Property Appraiser Qualification Criteria adopted by the Appraisal Foundation's Appraiser Qualification Board (AQB) as follows:
 - Successful completion of coursework and qualifying examinations in: Appraisal Valuation Theory, Market Research and Analysis, Appraisal Ethics, Methodology, Identification and Authentication, Federal Regulations and Functions, Legal Issues, and Narrative Report Writing Standards
 - Successful completion of coursework and qualifying examination in the ISA fine art specialization course
 - Recognized completion of the art market and appraisal development qualification requirements

SELECTED PUBLICATIONS:

Professional Manuals, Journals, Catalogs and Articles:

- *"Art Crimes and Misdemeanors: Managing Risk in Estate Administration and In Appraisals of Stigmatized Art"*. Co-author with Sarah Moore Johnson, Esq. Journal of Advanced Appraisal Practice, ISA Private Client Services, Spring 2019.
- *The Perils of a Discredited Appraisal: Critical Insights on Kollsman v. Commissioner*, Procedurally Taxing (Harvard Tax Law Blog) March 5, 2018
- *Emerging Authentication Expectations, Best Practices & New Ways Forward in the Wake of Knoedler*. Journal of Advanced Appraisal Studies, Foundation for Appraisal Education, April 2016.
- *Connoisseurship and the Fine Art Appraiser* [on the selection of comparative sales data], Journal of Advanced Appraisal Studies, Foundation for Appraisal Education, April 2014.
- *Authentication* [Best practices], Chapter 11, ISA Appraisal of Fine Art Course Manual, 2014

¹ ISA is the largest professional association of personal property appraisers in the United States and Canada

² The Appraisal Foundation is the foremost authority on the valuation services, authorized by Congress as the source of appraisal standards and appraiser qualifications.

³ The Certified Member (CAPP) distinction is the highest level of recognition ISA can bestow. There are no higher designations in the personal property appraisal profession in the United States. As of 2018, there are less than 30 individuals holding certified ISA status earned through the discipline of fine art.

- *Objective Criteria: How Comparable are Your Comparables?* Chapter 13, ISA appraisal of Fine Art Course Manual, 2014
- Contributing Editor: Chapters on *Frames* and *Photography*, ISA Appraisal of Fine Art Course Manual, 2014.

Public Interest:

- The Detroit Institute of Art Dueling Valuations: Fair Warning for Collectors, Art, Antiques & Luxury Design Magazine, September 10, 2014
- Ivory Ban & The Art Market. Art, Antiques and Luxury Design Magazine, March 22, 2015.
- Minding the Hen House: Professional Standards for Art and Antiques Appraisers. Art, Antiques & Luxury Design Magazine, July 14, 2014.
- How Much is My Artwork Really Worth? Insurance Appraisals and How Not to Use Them. Art, Antiques & Luxury Design Magazine, August 13, 2013
- 2006 Pension Protection Act and Donation Appraisals: IRS Redefines the Role of Galleries and Dealers, September, 2009
- Authenticity and Rembrandt Etchings: Cruise Ship Art, September 2009

SELECTED SPEAKING ENGAGEMENTS:

Accredited Continuing Education Sessions for Tax and Estate Attorneys and Insurance Professionals:

- *Artists, Collectors & Criminals: Planning for and Administering an Estate with Lost, Stolen, Fraudulent, or Illegal Art*, American College of Trust and Estate Counsel, (ACTEC) Regional Annual Conference, September 2018.
- *Preserving Wealth in Art: Key Trends, Risks and Opportunities*, Montgomery County Estate Planning Council, November 2017
- *The Global Art Market: Key Trends and Driving Forces*. Chubb Personal Insurance, Worldwide Internal Fine Art Team, (by live webinar) November 2016.

Professional Continuing Education for Personal Property Appraisers:

- Beyond Readily Apparent Identity (Diligence Standards for Confirming Authenticity), ISA National Conference, March 2018.
- Leveraging Art Market Trends to Build Your Appraisal Practice, ISA Continuing Education, November 2017
- Appraising Outliers at the High-End of the Art Market: Four Exceptional George Washington Portraits by Gilbert Stuart, ISA National Conference, April 2012; Reprinted as an ISA Webinar: November 2012

Public Interest:

- *The Importance of Diligence in Acquiring and Maintaining an Important Collection of Fine Art*, US Trust Art/Bank of America Private Collectors Event, May 2018
- *Diligence in Managing a Fine Art Collection* (Panel Discussion) Hosted by US Trust/Bank of America National Art Advisory Services, Michener Museum of Art, May 2017
- *Art Collecting and Wealth: Managing and Maintaining Value in Important Private Collections* (various venues and dates)
- *Collecting Fine Art: How Art Appraisers Determine Value and What it Means for Your Collection*, (various venues and dates)

EXPERT WITNESS EXPERIENCE: Preparation of written expert testimony for litigation support in nine (9) civil cases involving valuation of American art. Seven (7) were resolved on the basis of my submitted written testimony, two (2) were resolved for the retaining client following in-court testimony.

AWARDS:

- **The 2018-2019 International Society of Appraisers *Lamp of Knowledge Award***, for various presentations and writings, including course materials, related to diligence and practice standards for personal property appraisers in confirming authenticity.
- **The 2017-2018 International Society of Appraisers *Leadership Award***, for exceptional leadership including serving as the long-standing Chair of the ISA Specialty and Advanced Studies Committee.
- **The 2016 - 2017 International Society of Appraisers *Lamp of Knowledge Award***, for a singular scholarly publication in the field of personal property appraising: *Emerging Authentication Expectations, Best Practices & New Ways Forward in the Wake of Knoedler*. Journal of Advanced Appraisal Studies, Foundation for Appraisal Education, April 2016.
- **The 2015 – 2016 International Society of Appraisers *President's Award***, for achievements while serving as President of the ISA from 2013-2015 including: conception and development of the 11 hour CHUBB Connoisseurship Webinar Continuing Education Series; conception and development of the "Circle of Trust", an inter-organizational professional peer collaboration to promote The Personal Property Appraiser Credentialing Criteria developed by the Appraiser Qualification Board of The Appraisal Foundation.
- **The 2012 - 2013 International Society of Appraisers *Leadership Award***, for serving as Vice President of the ISA, and creation and development of the ISA Affinity Business Partnership Program.

EXPERIENCE:

- President and Founder: Art Appraisal Firm, LLC (1999 - Present)
- The Appraisal Foundation Board of Trustees (Term 2019-2022)
- President, International Society of Appraisers (2013 - 2015)
- Vice-President, International Society of Appraisers (2011 - 2012)
- Current ISA National Committee Activities:
 - Chair: ISA Advanced and Specialty Studies Committee
 - Committee Member: ISA Ethics Committee
 - Board of Directors Nominating Committee
 - Peer Report Submission Reviewer, ISA Designation and Review Committee (2008 – Present)
- Selected Past ISA National Committee Activities:
 - ISA Fine Art Course Manual Revision Committee, contributing editor (2013 - 2014)
 - Developer: *ISA Presents for Chubb*, an 11-part, international webinar connoisseurship series (2015)
 - Chair: ISA Taskforce on Specialization and Expertise (2012)
 - Board liaison to the ISA Director of Education and Designation and Review Committee
- Proprietor, The Charleston Galleries, Philadelphia, Wayne and Lambertville (1991 – 2001)
- Supervising Litigation Paralegal: Disabled Veteran's Benefits Division, Community Legal Services, Philadelphia, PA. (1976 – 1989)

EDUCATIONAL BACKGROUND UNRELATED TO APPRAISING:

- B.A., Human Services, Antioch College, 1979
- Graduate Studio Courses: Pennsylvania Academy of the Fine Arts, 1989-1991
- Graduate Studio Courses: University of the Arts, 1989-91

SELECTED CLIENT LIST: Corporate and Institutional clients include: Smithsonian Institution, Hotel DuPont Art Collection, E. I. du Pont de Nemours Corporate Art Collection, The Wilmington Trust, The Glenmede Trust, The Philip and Muriel Berman Foundation, The Philip and Muriel Berman Museum of Art at Ursinus College, National Museum of the United States Marine Corps, Philadelphia Academy of Natural Sciences, The Woodmere Art Museum, Travelers Indemnity Company of America, Haverford College, Questroyal Fine Art Gallery, The Newman Galleries, Schwarz Gallery, Gratz Gallery and Conservation Studio, Sotheby's Auction, Freeman's Auction. Private client list available upon request.