



JAMIE L. BURRESS, CFA, CPA / ABV

EDUCATION

- Masters of Business Administration, Finance, Southern Methodist University 1998
- Bachelor of Science in Business Administration, Accounting, University of Arkansas, 1988

PROFESSIONAL CERTIFICATIONS

- Certified Public Accountant-Texas (CPA) 1991
- Accredited in Business Valuations (ABV) 2006
- Chartered Financial Analyst (CFA) 2005

PROFESSIONAL ORGANIZATIONS

- American Institute of Certified Public Accountants (AICPA)
- Texas Society of CPAs - Houston Chapter
- CFA Institute and CFA Society of Houston

WORK EXPERIENCE

- Whitley Penn LLP, Forensic Litigation Valuation Services
 - Managing Director (2018 – Present)
- Cabrillo Advisors, Valuation Services
 - Director (2012 – 2018)
- Duff & Phelps, Valuation Advisory Services
 - Director (2006 – 2012)
- Deloitte Financial Advisory Services, Valuation Services
 - Manager (1999 – 2005)
- TIG Insurance Company, Corporate Accounting Group
 - Senior Financial Analyst (1997 – 1998)
- Republic Insurance Company, Reinsurance Accounting Group
 - Reinsurance Accounting Manager (1991 – 1996)
- Ernst & Young, Assurance Practice
 - Senior Auditor (1988 – 1990)

WORK SUMMARY

Over the past 20 years, Jamie Burress has led and performed valuations of business entities and intangible assets for acquisition, divestiture, financing, financial reporting, tax and litigation. Her valuation experience primarily includes purchase price allocations for financial reporting and tax purposes, goodwill impairment testing, gift and estate valuations, share-based compensation valuations and entity valuations for tax reporting, restructuring, and litigation.

INDUSTRY EXPERIENCE

Jamie's industry focus for the last 10 years has been in the energy sector, including oilfield services, midstream operations, upstream and mining, including metals and coal. Additionally, she has advised many clients in the technology, biotechnology, industrial, manufacturing, specialty retail, real estate, health care, and financial services industries.

LECTURES/PUBLICATIONS

- 2010 Speaker TSCPA Spring Accounting Expo-Houston Chapter – *“Trends in Goodwill Impairment Testing”*
- 2009 Speaker Fulbright & Jaworski Business Divorce Seminar – *“Common Issues in Partnership Valuations”*
- 2009 Speaker TSCPA Spring Accounting Expo-Houston Chapter – *“A CPA's Role in Intellectual Property”*
- 2008 Speaker Duff & Phelps Fair Value Update – *“Non-Controlling Interests and Step Transactions in Business Combinations.”*
- 2004 Speaker University of Arkansas Joint Principles of Finance and Accounting Classes – *“Cost of Capital Concepts and Analysis”*

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