

Martin W. Fox, CPA, CVA

Curriculum Vitae

Experience

Mr. Fox is a shareholder in the firm of Grimbleby Coleman CPAs, Inc. His breadth of work as a CPA has included accounting, tax planning and preparation, and business advisory services for closely-held businesses. Since receiving his designation as a Certified Valuation Analyst in early 2000, he has appraised a variety of businesses ranging from service companies to manufacturers. He has been actively engaged in consulting with entrepreneurs in closely-held businesses for the past several years. He is currently the head of the firm's business consulting and valuation department and is a charter member of the Consulting Accountants' Roundtable.

Mr. Fox's consulting and appraisal experience includes a variety of assignments with closely-held businesses. Industries include wholesale and retail fuel distributors, manufacturers and fabricators, real estate partnerships, construction, retail, and service establishments. He has performed appraisals for succession planning, buy-sell agreements, marital dissolutions, and estate and gift tax purposes.

Professional Designations

- CPA - Licensed as a Certified Public Accountant in California in 1981.
- CVA - Designated as a Certified Valuation Analyst by the National Association of Certified Valuation Analysts in 2000. (The CVA credential is accredited by the National Commission for Certifying Agencies).

Education

- Bachelor of Science in Accounting (*magna cum laude*), California State University Fresno, 1978.

Appraisal Education

- *Value-Driven Financial Analysis*, San Francisco, California, California CPA Education Foundation, 2009
- *Working Through the BV Standards*, National Association of Certified Valuation Analysts (NACVA), 2008
- *Advanced Business Valuation and Case Study Workshop*, Phoenix, Arizona, NACVA, 2007
- *Current Update in Valuations*, Phoenix, Arizona, NACVA, 2007
- *Key Ratio Analysis*, Foster City, CA, California Education Foundation, 2007
- *Advanced Business Valuation and Case Study Workshop*, Las Vegas, Nevada, NACVA, 2005
- *Current Update in Valuations*, Las Vegas, Nevada, NACVA, 2005
- *AICPA National Business Valuation Conference*, Phoenix, Arizona, American Institute of Certified Public Accountants, 2003
- *Annual Business Valuation Conference*, Coronado, California, NACVA, 2002
- *Current Update in Valuations*, Coronado, California, NACVA, 2002
- *Annual Business Valuation Conference*, Dallas, Texas, NACVA, 2000
- *Key Ratio Analysis*, San Francisco, California, California CPA Education Foundation, 2000
- *Business Valuation Fundamentals, Techniques & Theory*, New Orleans, Louisiana, NACVA, 1999
- *Business Valuation Case Analysis*, New Orleans, Louisiana, NACVA, 1999
- *Being Effective in Litigation Support & Expert Testimony*, New Orleans, Louisiana, NACVA, 1999
- *Development of Capitalization/Discount Rates & Valuation Discounts/Premiums*, New Orleans, Louisiana, NACVA, 1999

Consulting Education

- *Consulting Accountants' Roundtable*, regular participation since 1997
- *Key Ratio Analysis*, California CPA Education Foundation, 2007
- *Strategic Planning Facilitation*, Nashville, Tennessee, Technology of Participation, 2004
- *Financial Statement Analysis*, Chico, California, California Society of Certified Public Accountants, 2003
- *Facilitation Training*, San Francisco, California, Mentor Plus, 2001
- *Case Studies in Management Accounting*, California Society of Certified Public Accountants, 1996
- *Performance-Based Management and Value-Added Performance*, California Society of Certified Public Accountants, 1996
- *Strategic and Financial Planning*, California Society of Certified Public Accountants, 1996
- *Business Planning in a Changing Environment*, California Society of Certified Public Accountants, 1996

Professional Organizations

- National Association of Certified Valuation Analysts
- American Institute of Certified Public Accountants
- California Society of Certified Public Accountants, San Joaquin Chapter
- Consulting Accountants' Roundtable (since 1997)

Community Involvement

- Board member of Stanislaus Economic Development and Workforce Alliance
- Frequent speaker for Alliance Small Business Development Center
- Modesto Rotary Club