Jason R. Kwiatkowski, CPA, CA, CBV, ASA, CEPA

BUSINESS EXPERIENCE

Since 2011	Co-Founder and President, Valuation Support Partners Ltd.
2010 to 2011	Managing Director, BDO Canada Transaction Advisory Services Inc.
2005 to 2011	Senior Manager, BDO Canada LLP, Valuations & Litigation Support
2002 to 2005	Vice-President, Rudson Valuation Group Inc., Valuations & Litigation Support
1999 to 2002	Senior Associate, Rudson Valuation Group Inc., Valuations & Litigation Support
1996 to 1999	Senior Accountant, BDO Dunwoody LLP, Audit and Assurance

ACADEMIC AND PROFESSIONAL QUALIFICATIONS

2013	Chartered Professional Accountant, Chartered Professional Accountants of Ontario
2009	Certified Exit Planning Advisor, The Exit Planning Institute
2005	Accredited Senior Appraiser, The American Society of Appraisers
2000	Chartered Business Valuator, The Canadian Institute of Chartered Business Valuators
1998	Chartered Accountant, The Institute of Chartered Accountants of Ontario
1995	Honours Bachelor of Business Administration, Wilfrid Laurier University

PUBLICATIONS

November 2015	Contributing author for “Planning Would Have Saved Fight” – The Bottom Line November 2015
June 2015	Author of “The Undiscovered Planning Tool for Business Owners – Why Business Valuation is Critical for Planning Purposes”
Feb. 2012 – Date	Author of GTA Valuator blog for the business and legal communities on topics in business valuation, litigation support and exit planning (jasonkwiatkowski.blogspot.ca)
December 2012	Co-authored Chapter 27 “The Importance and Role of Business Valuations and Exit Planning” in “Advisors Seeking Knowledge – A Comprehensive Guide to Succession and Estate Planning”, published by LexisNexis 2012
May 2012	Co-authored “Good Valuation Can Be a Tax Shield” – The Bottom Line Mid-May 2012
September 2010	Authored “6 Steps to a Successful Business Exit” – Enterprise Magazine, Fall 2010
July 2010	Authored “Brokers Can Help Retiring Business Owners Maximize the Sale Value of Their Business by Going Over an Exit Plan with Their Clients” – Canadian Underwriter, Canada’s Insurance and Risk Magazine, July 2010
April 2010	Authored “Six Essential Elements of an Effective Exit” – CMA Management Magazine, April 2010
March 2010	Authored “Selling Your Business: Think Ahead - Maximize Your Company’s Value With a Comprehensive Exit Plan” – Canadian PLANT Magazine, March 2010
July 2008	Co-authored “New Reporting Standards Clarify Value of IP” – Lawyers Weekly, Vol. 28, No. 12, July 18, 2008
March 2008	Authored “Ten Tips to Tackle Expert Reports” – Lawyers Weekly, Vol. 27, No. 41, March 7, 2008
2003	Authored “Damages in Breaches of Tender” – Law Times, Vol. 14, No. 18, May 26, 2003
2003	Authored “Industry Transactions and Public Company Information in Business Valuations” – The RVG Witness, Spring 2003

SPEAKING ENGAGEMENTS

May 2018	Delivered an information session on income assessment for business owners to the York Region Collaborative Practice
May 2018	Presented at the Family Dispute Resolution Institute of Ontario (FDRIO) FDRethink the Future Unconference on saving family businesses in family disputes entitled “Saving the Golden Goose”
May 2017	Co-panelist for study group presentation on business valuation to the York Collaborative Practice
April 2017	Delivered an information session on business valuation to the BDC in Vaughan, Ontario
March 2017	Delivered an information session on business valuation to the Brock University Finance & Investment Group
November 2016	Delivered information sessions on business valuation to tax/estate planning professionals, high net worth planners and business succession advisors at TD Bank
March/April 2016	Delivered information sessions on business valuation and income assessment to the Collaborative Practice Durham Region
December 2015	Panelist for online webinar with Video Tax News entitled “Starting the Business Succession Conversation” on topics including business valuation, value enhancement and exit planning
November 2014	Delivered an information session on business valuation at O’Connor MacLeod Hanna LLP in Oakville, Ontario to business owners and professional advisors
June 2014	Delivered an information session on pre-sale planning in the digital age with a focus on business valuations to business owners and professional advisors in the greater Toronto area
April 2014	Delivered information sessions on business valuation in Markham and Mississauga to business owners and professional advisors
February 2014	Interviewed by Bill Black, host of “Exit Coach Radio” (internet radio show and podcast exitcoachradio.com) on issues involving business valuation
January 2014	Delivered an information session on financial issues in family law to lawyers at Feldstein Family Law Group
November 2013	Delivered an information session on business valuation in succession planning to lawyers at Mills & Mills LLP
November 2013	Interviewed by Kerri Salls, host of “Exit This Way” (internet radio show and podcast urbusinessnetwork.com) on “The 6 Step Recipe to a Successful Exit” for business owners
October 2013	Member of panel discussion on “Selling Your Business – How to Maximize Your After-Tax Proceeds” hosted by BMO Nesbitt Burns in Markham, Ontario before business owners and professional advisors
October 2013	Delivered an information session on business valuation at O’Connor MacLeod Hanna LLP in Oakville, Ontario to business owners and professional advisors
September 2013	Delivered an information session on business valuation at Wilson Vukelich LLP in Markham, Ontario to business owners and professional advisors
June 2013	Presented at the CICBV 2013 Eastern Regional Conference on “Business Transition and Demographics – Opportunities for the CBV Over the Coming Decade”
May 2013	Delivered a Professional Development session to family law lawyers on “Financial Issues in Family Law” with respect to understanding financial statements, business valuations and income assessments
March 2013	Keynote speaker to members of the Laurier Investment & Finance Association (LIFA) at the ICAO Top Investor Challenge at Wilfrid Laurier University
March 2013	Co-delivered a workshop event to business owners on business valuations hosted by Succession Strategies Group in Mississauga
January 2013	Delivered an information session on business valuation at a seminar series hosted by ScotiaMcLeod on “Succession Planning for Private Companies” to business owners

SPEAKING ENGAGEMENTS CONTINUED

2007 - 2012	Presented a seminar on the "Role of an Expert and 10 Steps to Critiquing an Expert Report" to numerous law firms, including Minden Gross LLP, Pallett Valo LLP, Aird and Berlis LLP, Fogler Rubinoff LLP, Gardiner Roberts LLP, Gowlings LLP, Lang Michener LLP, Lerners LLP, Miller Thomson LLP and Borden Ladner Gervais LLP
December 2012	Delivered an information session on "Building a Business for a Successful Transition" to business owners and professional advisors in Markham
November 2012	Presented "Pre-Sale Planning for Business Owners" to insurance and estate planning professionals at Creative Planning Financial Group in Toronto
February 2012	Presented "Building Business Value – A Key Consideration Before Exit" to members of the Scarborough Estate and Financial Planning Council
December 2011	Presented "Building Business Value – What is Your Business Worth & Why You Should Care" to members of the Markham Board of Trade
November 2011	Presented "Building Business Value – What is Your Business Worth & Why You Should Care" to members of the Oshawa Chamber of Commerce
September 2011	Presented "When are Business Valuations Required and Effective Exit Planning" to insurance and estate planning professionals at Independent Financial Concepts Group Ltd., in Vaughan
September 2011	Presented "Building Business Value - What is Your Business Worth & Why You Should Care" to members of the Ajax Pickering Board of Trade
May 2011	Presented "What is Your Business Worth & Why it is Important to Know" to members of the Richmond Hill Chamber of Commerce
February 2011	Presented "Is Fair Market Fair? What's Your Business & Intellectual Property Worth and Why You Should Care" at a corporate open house event sponsored by the Sign Association of Canada
October 2010	Presented "Valuations Related to Financial Reporting" at BDO MYPDR 2010 Accounting and Assurance Annual Update
September 2010	Presented "Is Fair Market Fair? What's Your Business & Intellectual Property Worth and Why You Should Care" at the 2010 Annual Conference of the Sign Association of Canada
June 2010	Presented "Well Worth It: Building Business Value" to the Entrepreneurs' Organization in Toronto
October 2009	Presentation to the business and legal community on "Introduction to Business Valuation" at a conference co-hosted by BDO Dunwoody LLP and Hays Recruiting in Mississauga
September 2009	Presented a workshop on "Understanding Your Company's Financial Health" at the 10th Annual Profit Hot 50 2009 GrowthCamp in Niagara-on-the-Lake
June 2009	Presentation on "Understanding the Income Statement and Building a Dashboard" to participants of the Accelerator Program hosted by the Entrepreneurs' Organization in Toronto
June 2009	Co-presenter on the "Valuation of Intellectual Property" at the Federated Press 6th Valuation and the Tax Practice in Toronto
January 2009	Presentation on the "Valuation of Intangible Assets" at the Infonex Transfer Pricing Update 2009 conference in Toronto
April 2008	Co-presenter on "Users of Financial Statements" to the Entrepreneurs' Organization in Toronto
April 2005	Presented a seminar to lawyers on "Quantifying Damages in Multiple Office IA Departures" at a conference on Assessing Damages in Securities Litigation hosted by Rudson Valuation Group Inc.
2004 / 2005	Presented seminars to a business brokerage firm in Oakville, Ontario on business valuation issues
2001	Guest speaker at a Canadian Institute of Chartered Business Valuators Toronto Workshop on "Breach of Tender – Damages in Construction Law"

PROFESSIONAL ACTIVITIES AND AFFILIATIONS

Member, Collaborative Practice Toronto, Financial Professional (since 2014)

Member, Durham Region Collaborative Practice, Financial Professional (since 2012)

Member, York Collaborative Practice, Financial Professional (since 2011)

Member, Exit Planning Institute (since 2009)

Member, American Society of Appraisers (since 2005)

Member, Canadian Institute of Chartered Business Valuators (since 2000)

Past member, CICBV Education/Continuing Education Committee (2008 to 2010), Other Communication Task Force (2007), Toronto Workshop and Eastern Conference Committee (2002 to 2004)

Member, Chartered Professional Accountants of Ontario (formerly Institute of Chartered Accountants of Ontario) (since 1998)

OTHER ACHIEVEMENTS

Testified before the Superior Court of Justice in Ontario as an expert witness in business valuation, stock option and restricted stock valuation, income assessment and damage quantification

Completed Level I & II Training with the Ontario Collaborative Law Federation (OCLF)

Participated as an expert in business valuations, income assessments and damages quantification at mediations, arbitrations, settlement conferences and collaborative meetings involving commercial and shareholder disputes and matrimonial separations

Participated in mock trial settings as an expert witness in business valuation and litigation accounting matters for:

- Borden Ladner Gervais LLP internal trial advocacy training program (2005 and 2003);
- Lerners LLP internal trial advocacy training program (2004);
- The National Institute of Trial Advocacy training session at the University of Toronto (2002); and
- The University of Toronto Trial Advocacy Program (1999 to 2005).

Specialized in business and securities valuation, exit planning advisory and financial litigation support since 1999 in numerous and various matters relating to business valuation, damages quantification, value enhancement and exit planning.