Clifford B. Benjamin, CVA

Founder & President -Summit Business Valuation Associates, LLC (Established 2013)

Founder & President -Sound Crest Financial Services, LLC (Established 2006)

Founder & President -Summit Divorce Planning, LLC (Established in 2003)

Associate: American Bar Association, Section of Family Law

Member: International Academy of Collaborative Professionals

Member: National Association of Certified Valuation Analysts

Financial Member: Florida Lawyers Network

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**Education & Training:**

Southern Connecticut State University (B.S. Economics, 1982); Certified Valuation Analyst (CVA 2013), with the National Association of Certified Valuation Analysts (NACVA), General Securities Principal (Series 24, 2008); General Securities Representative (Series 7, 2003); Uniform Securities Agent State Law Examination (Series 63, 2003) Uniform Investment Advisor Law Examination (Series 65, 2008), TN Department of Commerce and Insurance (Life & Health 2003), Certified Divorce Financial Analyst (CDFA 2003) with the Institute of Certified Divorce Financial Analyst (idfa) and is collaboratively trained through International Academy of Collaborative Professional (2012). I continue my educational pursuit through ongoing continuing professional educational programs offered by various professional groups.

**Experience:**

**President,** **Summit Business Valuation Associates LLC (2013-present)**

Produces business valuations for: family law cases, shareholder and partnership disputes/buyouts, mergers, acquisitions and company sales, economic damages calculations, business valuation critiques and succession planning.

**Recent business valuation cases and public speaking engagements:**

Appointed Family Law Case: Awash V. Aga Business Valuation of M. Market a Gas Station/Convenience Store: Fourth Circuit for Davidson County Tennessee, Docket No. 14 D 2134 Reference Attorney Brad Frakes.

Business Valuation Critique: Family Law Case: Copeland V. Copeland Business Valuation of Empire CG LLC District Court, 431st Judicial District, Denton County, Texas No. 18-9759-431. Reference Brian A. George Managing Partner Calas Group.

Business Valuation: Asset Purchase/Sale, Fair Market Valuation of a Restaurant El Pasapoga located at 115725 SW 72nd street, Suite 184, Miami Florida, 33193. Reference Brian A. George, Managing Partner.

Retained Family Law Case: Financial asset reconstruction, primarily residential housing builder and business investor, Macon County, Sumner County and Wilson County TN. Reference Angel Kane, Attorney at Law with Kane and Cromwell Family Law Center.

Conducted two-hour podcast including 2 CLE credits for Attorneys, cosponsored by Calas Group, EPGD Law of South Florida, regarding Small Business Valuations for Buy/Sells, Probate and divorce proceedings.

Conducted two-hour podcast including 2 CLE credits for Attorney’s available through the Federal Bar Association Website at a charge of $199.00 regarding Small Business Valuations for Buy/Sells, Probate and divorce proceedings.

Guest Speaker- Florida Lawyers Network- Business Valuation for the small business owner, presented in years, 2019, 2018 & 2017

**President, Sound Crest Financial Services, LLC and Investacorp**, **(2006 - present)**

Investment solutions and wealth management is offered as advice to individuals, families, business owners and institutions.

Investacorp Leaders Forum for top producers 2019, 2017 & 2016.

August 2015 Financial Advisor Magazine Cover Story

Investacorp Conference Guest Speaker, Beaver Creek Colorado, how to win business referrals in a family law centered financial planning practice, 2007 and 2012.

**President, Summit Divorce Planning, LLC (2003 – present)**

Employs accounting-based reports and financial planning tools which prove to be essential in supporting claims of spousal support, aid in the development of proposed equitable division of assets and illustrations for marital economic misconduct calculations.

**Experience:**

In 1998, I began a three year action of divorce that utilized the services of one of Connecticut’s top family law firms of Fitzmaurice & Siegel, New York City based STZ Analytical Services for forensic accounting, and for my former wife’s Securities law misconduct, New York City based Law Firm of Kaufmann, Feiner, Yamin, Gildin & Robbins, LLP was retained.

Upon the completion of a nationally reported six-day divorce trial that I won, I redirected my career focus to provide economic litigation support and financial planning to lawyers and clients with complex financial needs.

**Skills & Knowledge –Enterprise level, Management, Marketing and Sales (1982-2001**)

1998- 2001 Hearst Magazines New York City, N.Y., Group Advertising Director with sales and marketing responsibilities that included the following magazine brands: Cosmopolitan, Country Living, Esquire, Good Housekeeping, Harper’s Bazaar, House Beautiful, Marie Claire, O, The Oprah Magazine, Popular Mechanics, Redbook, SmartMoney, Town & Country, Hearst Interactive Media and Hearst Licensed Products. I was responsible for substantially increasing revenue across all magazine brands, introducing innovative marketing programs and for launch of O, The Oprah Magazine.

1994 -1998 The New York Times Company New York City, N.Y. recruited me to manage its joint publishing venture with IBM, which I later helped facilitate the sale of the The Forbes Magazine Group. Upon the successful integration of the New York Times Custom Publishing Division to Forbes Magazine Group, I was promoted to the brand management committee with oversight into the entire company’s business activities.

1990 -1994 Chief Executive Magazine, New York City, N.Y., Advertising Sales Director/business department. Managed the publication's national sales organization while working to serve the information and business development needs of CEO's and Presidents of America's and some of the worlds’ most powerful corporate executives.

1986 -1989 Travel and Financial Category Director with Goldhirsh Publishing New York City, N.Y., the owner of Inc Magazine and Business Month.

1982 - 1986 Trans Global Films in New York City, N.Y, developed and managed global advertising campaigns for the MTA, Shaffer Pen, BMW and Remy Marin.

**Other past committee affiliations:** The Financial Communications Society of New York, The New York Chapter of The Fresh Air Fund, Boy Scouts of America Manhattan and the Bronx Council, and The New York Athletic Club.

**Other Acknowledgements:** Named to Citation’s Who’s Who Among Rising Young Americans 1991.