

**CURRICULUM VITAE OF**

**JEFFREY D. URBACH, MBA, CVA, CFE, CPA/ABV/CFF**

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*Founding Partner:*

Urbach & Avraham, CPAs, LLP  
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Email: [jdu1@ua-cpas.com](mailto:jdu1@ua-cpas.com) [www.ua-cpas.com](http://www.ua-cpas.com)

*Education:*

BA Temple University, 1973  
MBA Rutgers University Graduate School of Business Administration, 1975

*Professional:*

Licensed CPA in NJ  
(CPA Exam passed first sitting 11/75)

Accredited in Business Valuation (ABV) - American Institute of CPAs  
(8 hour full exam passed first sitting 11/01)

Certified in Financial Forensics (CFF) - American Institute of CPAs

Certified Valuation Analyst (CVA) - National Association of Certified Valuation Analysts (NACVA)

Certified Fraud Examiner (CFE) - Association of Certified Fraud Examiners (ACFE)

Certificate of Educational Achievement (CEA) - Business Valuations  
(Awarded by AICPA after completing 64 hours of continuing professional education and 8 exams)

Rule 1:40 Court Approved Mediator:  
Civil, General Equity and Probate  
Economic Aspects of Family Law Cases

Trained in Collaborative Law

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### *Memberships:*

American Institute of CPAs (AICPA)  
AICPA FVS  
International Association of Consultants, Valuators, and Analysts (IACVA)  
New Jersey Society of CPAs (NJSCPAS)  
NJ Association of Professional Mediators (NJAPM)  
Mid-Jersey Collaborative Law Alliance (founding member, Officer)  
Association of Certified Fraud Examiners (ACFE)  
National Association of Certified Valuation Analysts (NACVA)  
Past Member of NACVA Technical Support Group  
Guardianship Association of New Jersey  
New Jersey Council of Collaborative Law Practice Groups (founding member)

### *Past Professional Committee Memberships:*

NJSCPAS Matrimonial, BV, Litigation Support Interest Groups (Past Member)  
NACVA Education Board  
NACVA Consultants Training Institute  
NACVA Litigation Forensics Board (past member)  
NACVA Annual Conference Planning Committee, 2005, 2006, 2009

### *Professional Experience:*

Public accounting career since 1975...certified audits, reviews, compilations, tax planning and return preparation for a wide range of service and distribution companies, physicians, chiropractors, other health care providers, and real estate ventures including HUD projects.

Qualified in New Jersey courts as an expert in accounting, valuation, and forensic matters...Experienced in matrimonial and commercial matters involving business valuations, asset tracing for equitable distribution, hidden assets and income, buy-sell disputes, financial fraud, guardianship abuses, and tax matters review of property settlement agreements, QDRO's, document requests, CISs, Discovery matters, and deposition and trial witness questioning.

### *Continuing Professional Education:*

Mr. Urbach has maintained a proficiency in the technical aspects of his practice by fulfilling the Continuing Education Requirements of the AICPA, NACVA, and ACFE. Mr. Urbach averages in excess of 30 continuing professional education hours in valuation, forensic services or family law each year.

### *Court Appointments*

Mr. Urbach has been court appointed in New Jersey to provide forensic, valuation, and receivership services in connection with various litigation matters several times a year for over thirty years.

### *CPE Teaching & Academia*

- ❑ Lecturer of Accounting at Rutgers University from 1978-1985
- ❑ Consultants Training Institute (CTI) formerly NACVA ,Senior Instructor (1997-present)
- ❑ NJAPM Mediation Training Faculty (Financial & Tax expert matters)

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- ❑ Rutgers University Graduate School of Business; Adjunct faculty Lecturer: Small Business Finance for Entrepreneurs.(Spring 2010)

### *Awards*

- ❑ Recipient of NACVA “Instructor of Great Distinction Award” 1998, 1999, 2000, 2001, 2002, 2004, 2006, 2007
- ❑ Recipient of NACVA “Instructor of Exceptional Distinction Award” 2003,2008, 2011
- ❑ 2002 NACVA Outstanding Member

### *Authorship*

Co-author 8 credit course: *NACVA Current Update in Business Valuations* (Taught around the country three to five times per year since 1997.)

Author 8 credit course: *Understanding the Divorce Engagement: It's More Than Just Valuations* (NACVA)

Founder and Team Leader, Co-Author, five-day, 40 credit NACVA program “Matrimonial Litigation: Fundamentals, Techniques & Theory”.

*Family Law Services Handbook*, Chapter 10—Equity-Based Compensation: Stock Options. Published by John Wiley, Fall 2010.

*CFE Body of Knowledge*—Co-author Matrimonial Accounting section of exam preparation materials.

### *Presentations/Seminars*

- October 2000 5<sup>th</sup> Annual NJ Guardianship Association Conference
  - Panel: Mediation & Guardianship
  - Panel Moderator: Unearthing the Ward’s Hidden Assets
- May 2000 Panel of Experts- 2000 Annual NACVA Conference: Supporting the Attorney in Divorce
- May 2001 Panelist-Middlesex County Family Law Section Dinner: “MDP Approach to Mediation”
- September 2002 NJ Association of Professional Mediators, (co-speaker), "Brown v. Brown – Understanding Valuation Discounts".
  - Understanding Valuation Discounts".
- October 2002 NJSCPAS Litigation Support Mega Conference, “Valuing Employee Stock Options”
- May 2003 NACVA Annual Conference “Valuing Employee Stock Options for Divorce”
- September 2003 NJ Association of Professional Mediators. “Mediating Fringe Benefits”
- October 2004 NJ Association of Professional Mediators Annual Conference, Co-speaker: “Financial Aspects of Divorce”
- October 2004 Presenter, NACVA program “Matrimonial Litigation: Fundamentals, Techniques & Theory”
- February 2005 NJAPM family mediation training program: financial and tax aspects of divorce to be considered by mediators.
- May 2005 Divorce Conference, NJSCPAS/ICLE/Family Section of NJ Bar. “Understanding a Business Valuation Report”
- June 2005 NACVA 12<sup>th</sup> Annual Conference, Co-Speaker, “Emerging Issues in Family Law”
- November 2005 NJAPM family mediation training program: financial and tax aspects of divorce to be considered by mediators.
- November 2005 NJ Association of Professional Mediators 12<sup>th</sup> Annual Conference, Co-speaker: “An Update on Financial Issues and Divorce”.
- June 2006 NACVA 13<sup>th</sup> Annual Conf., Panelist “Industry & Company Analysis”

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- October 2006 Panelist Middlesex County Family Law Section Dinner: “Business Valuations”
- February 2007 NJAPM, Co-speaker; “Tax Implications of Civil Unions”
- June 2007 14<sup>th</sup> Annual NACVA Conference, Co-Panelist “So You Want to be a Matrimonial Accounting Expert?”
- November 2007 Society of Louisiana CPAs, “Discussion of SSVS No. 1”
- January 2008 NJSSCPAS, Discussion Leader, “Valuation Services Roundtable: The Practical Impact of SSVS-1 on Litigation Services.
- May 2008 NJ State Bar Convention, Panelist “Personal v. Enterprise Goodwill”
- June 2009 NJ ICLE, ADR Day XII, Panel Participant, SSVS-1 etc.
- January 2010 NJSSCPAS, presenter SSVS-1 : A Two year update
- September 2010 NJSSCPAS, *Business Valuation, Forensic Investigation & Litigation Services Conference*, Report Writing, Edison, NJ
- June 2012 Rutgers Sixth Fraud Conference, “The Role of the Matrimonial Accountant in Divorce”
- June 2014 NJAPM Divorce Conference, (Pension Plans and Divorce)
- May 2015, NJ Annual Bar Convention Panel Speaker “New Jersey Family Collaborative Law Act: Making it a Part of your Practice.”
- October, 2015, Panel Speaker, Middlesex Bar, ICLE, “Collaborative Law Practice.”
- June 2016 NACVA Annual Conf, Collaborative Law
- January 2018 NJAPM Webinar: Highlights of the “Tax Cuts and Jobs Act” (P.L. 115-97)
- March 2018 Presentation to MJCLA Annual Retreat: Highlights of the “Tax Cuts and Jobs Act” (P.L. 115-97)
- April 2018 NJAPM Conference, Highlights of the “Tax Cuts and Jobs Act” (P.L. 115-97)

#### *Publications*

- “Business Valuations and Forensics”, *The Valuation Examiner*, January/February 2001.
- "Valuation Case Study: Using the Goodwill Registry to Value a Medical Practice", *American Journal of Family Law*, Spring 2002.
- “Stock Option Distribution via Constructive Trusts in Divorce Settlements”, *The Valuation Examiner*, January/February 2006 and *New Jersey Family Lawyer*, February/March 2006, Co-authored with Charles F. Vuotto, Esq.
- Family Law Services Handbook, Chapter 10—*Equity-Based Compensation: Stock Options*. Published by John Wiley, Fall 2010.
- *CFF Body of Knowledge*—Co-author Matrimonial Accounting section of AICPA CFF Exam preparation materials.
- *NJ Family Lawyer*, June 2012, Alimony & Taxes, Co-Authored with Amy Wechsler, Esq.

#### *Other:*

NJ Family Collaborative Law Act, P.L. 2014, c. 50, signed into law on September 10<sup>th</sup>.

Mr. Urbach was part of the *Legislative Committee* of the *New Jersey Council of Collaborative Law Groups*. Representing financial professionals involved in the practice of Collaborative Law, he worked with a team of attorneys and mental health experts guided by a professional lobbyist. The Team met in groups and individually with key legislators and the AOC explaining and encouraging the passage of the Act. He had the privilege of testifying before the *Law Review Commission* in Newark, NJ.

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