Jim Lisi

Jim is principal and chief valuer of his firm, SB Valuations. He is trained as an industrial engineer from the University of Michigan with an MBA from UC Irvine. He has a couple of valuation credentials. The first designation is Certified Valuation Analyst from NACVA and the other is an appraisal review designation from the International Society of Business Appraisers.

He has valued over 500 companies and their securities, and examined over 70 angel investment deals. His valuation reports range from simple value calculations to full discount valuations of company securities, including growth companies with complex capitalization tables. In addition, as a loan committee member for California Coastal Rural Development Company, he has been part of reviewing and approving over 200 state guaranteed business loans since 2015.

Jim has published four important papers, one each with Business Valuation Update, The Value Examiner, the ISBA Journal and the Journal of Investigative and Forensic Accounting. As an engineer, the main thrust of the four papers is the use of scientific method in valuation – the nature of cause and effect –as differentiated from data statistics and correlations.

Places where Jim’s work is used, other than in tax matters, is exit planning, California divorce, employee equity grants and damages litigation.