

STATEMENT OF QUALIFICATIONS

LINDY D. IRELAND

Vice President and Shareholder

With over thirty years of experience in financial compliance, planning and analytical roles, Lindy's practice includes business valuation, ownership succession, business combinations, and consulting to middle market companies. Her experience and technical expertise extend to valuations for purposes including gifting, stock transfers, and ESOP, with a focus on an individual company's operational challenges and value drivers. Lindy joined BCC in 2006 and is a frequent presenter at industry events on valuation topics and employee ownership.



Lindy Ireland

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515.777.7071

OTHER PROFESSIONAL EXPERIENCE

- KPMG, LLP, Des Moines, IA
Tax Manager
- PwC, LLP, Memphis, TN
- Security Savings, Garden City, KS
Controller

EDUCATION

- Stevens College
- Texas A&M University, West Texas University,
Drake University

PROFESSIONAL MEMBERSHIPS

- American Society of Appraisers
- National Center for Employee Ownership
- ESOP Association
- Iowa Bankers Association
- Community Bankers of Iowa
- Nebraska Independent Community Bankers
- Virginia Bankers Association
- Virginia Association of Community Bankers

- Business valuation
 - Gifting/stock transfers
 - Estate taxation
 - Buy/sell agreements
 - Regulatory compliance
 - Shareholder transactions
- Ownership succession
- ESOP
 - Consulting and Formation
 - Compliance
- Equity compensation plan valuation
- Purchase price allocation
- Impairment testing
- Fairness opinions

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PRESENTATIONS & ARTICLES

- “Which Exit Strategy is Right for You and Your Business?” panelist for Morgan Stanley’s Women & Wealth Planning the Excellent Exit presentation, via Zoom – May 18, 2023
- “Why Consider an ESOP?” presented at the **2023 Iowa Employment Conference**, Altoona, IA – April 6, 2023
- “What is Driving Pricing in Midwest Bank Acquisitions?” published in the **Community Bankers of Iowa Bankers Update newsletter**, Des Moines, IA – 1st Quarter 2023
- “Wealth Transfer in 2021 – Private Company Stock” presented to **Des Moines Estate Planners Forum**, Des Moines, IA – May 3, 2021
- “Repurchase Obligation Forecasting,” presented at the 2020 **Iowa Nebraska Chapter of the ESOP Association Winter ESOP Conference**, Cedar Rapids, IA – February 27, 2020
- “Succession Issues for Bank Leaders,” presented to **BEST Bank Peer Group Meeting**, West Des Moines, IA – October 25, 2019
- “Determining Stock Value,” presented at the 2019 **NCEO “Is an ESOP Right for You?” Meeting**, Omaha, NE – October 10, 2019
- “What’s Your Company Worth? ESOP Valuation,” presented at the 2019 **NCEO Nuts and Bolts Meeting**, West Des Moines, IA – August 7, 2019
- “Effective ESOP Administrative Committees,” webinar presented for **NCEO**, online to national membership – March 26, 2019
- “What’s Your Company Worth? ESOP Valuation,” presented at the 2018 **NCEO Nuts and Bolts Meeting**, Overland Park, MO – July 12, 2018
- “Valuation of Stock for Initial ESOP Transactions,” co-presented at the 2018 **NCEO Employee Ownership Conference**, Atlanta, GA - April 18, 2018
- “Effective ESOP Administrative Committees,” webinar presented for **NCEO**, online to national membership – March 27, 2018
- “Being an Inside Trustee: What It Involves and How to Do It with Excellence,” co-presented at the 2017 **ESOP Association Midwest Conference**, Omaha, NE - September 7, 2017
- “Understanding the Basics of ESOP Fiduciary Issues,” co-presented at the 2017 **NCEO Employee Ownership Conference**, Denver, CO - April 4, 2017
- “Valuation Issues,” hosted Expert One-on-One sessions at the 2017 **NCEO Employee Ownership Conference**, Denver, CO - April 5, 2017

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- “Bank Valuation,” presented to **BEST Bank Peer Group Meeting**, West Des Moines, IA – February 23, 2017
- “Becoming an Effective Administration/Fiduciary Committee: What to Ask, What to Know, What to Document,” co-presented at the 2016 **NCEO Employee Ownership Conference**, Minneapolis, MN - April 12, 2016
- “What a New ESOP Company Needs to Know About Value: What Moves it Forward, What Holds it Back, and What About Discounts?” facilitated Expert-Led Roundtable Discussion at the 2016 **NCEO Employee Ownership Conference**, Minneapolis, MN - April 13, 2016
- “Becoming an Effective Administration/Fiduciary Committee: What to Ask, What to Know, What to Document,” co-presented at the 2015 **ESOP Association Midwest Conference**, Bloomington, MN - September 10, 2015
- “Helping Your Employees Understand Value and How They Influence It,” facilitated Expert-Led Roundtable Discussion at the 2015 **NCEO Employee Ownership Conference**, Denver, CO - April 22, 2015
- “Value Indicators for Community Banks,” presented to 2015 **BEST Bank Peer Group Meeting**, West Des Moines, IA – February 27, 2015