

IAAO PRESENTS



PREP & TRIAL

JULY 10 - 11, 2025

*Blackwell Inn, Ohio State University Campus
Columbus, OH*



Designed for lawyers, assessors, and appraisal personnel who want to be better prepared for appeals. Topics include depositions, preparing assessment cases, critiquing appraiser and rebuttal witness testimony, and trial mechanics, culminating in a mock trial on an assessment appeal of a hotel property valuation.

Learn more at www.iaao.org/prepandtrial

THURSDAY, JULY 10, 2025 Education Sessions

7:30 - 8:15AM	Registration and breakfast
	Opening Remarks Kent Barnett, <i>Dean and J. Gilbert Reese Chair in Contract Law, Moritz College of Law, Ohio State University for OSU</i> Donna Vandervries, AAS, CAE, PPS, Esq., 2025 IAAO President
8:15 - 8:30AM	
8:30 - 9:30AM	A Successful Defense Starts Before Litigation Thomas Jaconetty, Esq., <i>Thomas Jaconetty, Attorney at Law, Chicago, IL</i>
	Administrative Hearings: The Wild West of the Property Tax World Damian Lara, Esq., <i>Assessor, Bernalillo County Assessor's Office, NM</i> Fabian Montoya, <i>Chief Appraiser, Bernalillo County Assessor's Office, NM</i> William Shepherd, Esq., <i>William D. Shepherd, PA, Delray Beach, FL</i>
9:30 - 10:30AM	
10:30 - 10:45AM	Break
	Deciding to Litigate – Legal, Practical, and Political Considerations Jennifer Lineaweaver, <i>Director of Assessment, Town of Stonington, CT</i> Damian Lara, Esq., <i>Assessor, Bernalillo County Assessor's Office, NM</i> Christina Lynch, Esq., <i>Director of Legal, Cook County Assessor's Office, Chicago, IL</i> William Shepherd, Esq., <i>William D. Shepherd, PA, Delray Beach, FL</i> William Miller, <i>Managing Director & Litigation Practice Group Leader, Integra Realty Resources, Chicago, IL</i>
10:45 - 11:45AM	
11:45AM - 12:45PM	Lunch
	Discovery and Depositions Damian Lara, Esq., <i>Assessor, Bernalillo County Assessor's Office, NM</i> William Shepherd, Esq., <i>William D. Shepherd, PA, Delray Beach, FL</i> Christina Lynch, Esq., <i>Director of Legal, Cook County Assessor's Office, Chicago, IL</i>
12:45 - 1:45PM	
	Analyzing the Appraisal Report William Miller, <i>Managing Director & Litigation Practice Group Leader, Integra Realty Resources, Chicago, IL</i> William Shepherd, Esq., <i>William D. Shepherd, PA, Delray Beach, FL</i> D. Mike Daniel, Jr., <i>State Certified General Appraiser, Integra Realty Resources, Orlando, FL</i>
1:45 - 2:45PM	
2:45 - 3:00PM	Break
	Three Views of Property Tax Litigation: The Assessor, The Expert Witness, & The Attorney Donna Vandervries, AAS, CAE, PPS, Esq., 2025 IAAO President Jennifer Lineaweaver, <i>Director of Assessment, Town of Stonington, CT</i> William Miller, <i>Managing Director & Litigation Practice Group Leader, Integra Realty Resources, Chicago, IL</i> Christina Lynch, Esq., <i>Director of Legal, Cook County Assessor's Office, Chicago, IL</i>
3:00 - 4:00PM	
4:00 - 5:00PM	Appraisal Standards & Assignment Conditions Shawn Wilson, <i>Compass Real Estate Consulting, Inc., Lakeland, FL</i>

* Program is subject to change.

FRIDAY, JULY 11, 2025 Mock Trial

Roles will be played by:

Judge: Donna Vandervries, AAS, CAE, PPS, Esq.

Plaintiff's Attorney: William Shepherd, Esq.

Plaintiff's Witness: Shawn Wilson

Defendant's Attorney: Damian Lara, Esq.

Defendant's Assessor: Jennifer Lineaweaver

Defendant's Witness: Fabian Montoya

7:15 - 8:00AM – Breakfast

8:00 - 8:30AM General Trial Strategies

8:30 - 8:45AM Opening Statements

8:45 - 10:15AM Plaintiff's Case

10:15 - 10:30AM – Break

10:30 - 11:45AM Defendant's Case

11:45AM - NOON Closing Statements

12:00 - 1:00PM – Lunch

1:00 - 1:30PM Post Trial Considerations

1:30 - 2:30PM Exemption Litigation – A Different Beast

2:30 - 2:45PM – Break

2:45 - 3:45PM Hot Topics in Litigation Panel Discussion

Donna Vandervries, AAS, CAE, PPS, Esq.,

2025 IAAO Legal Committee:
William Shepherd, Esq.; Christina Lynch, Esq.; William Miller; Rex Lawhorn; Jennifer Lineaweaver; and Damian Lara, Esq.

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HOTEL

The Blackwell Inn & Pfahl Conference Center

The Blackwell Inn sits at the heart of The Ohio State University campus at the center of the best Columbus has to offer.

- To reserve a room, scan the QR code or visit www.iaao.org/blackwellinn



RECERTIFICATION/ CLE CREDIT

IAAO will apply for Continuing Legal Education credits. Because of variations in each state's CLE rules and regulations, IAAO cannot guarantee that states will approve the seminar for CLE accreditation. (Note: Continuing Legal Education (CLE) credits are not the same as CEUs)

The deadline to register for CLE credit is May 5. For more information on CLE hours, contact [Elizabeth Ferguson at ferguson@iaao.org](mailto:Elizabeth.Ferguson@iaao.org).

SCHOLARSHIPS

The IAAO Scholarship Fund exists for the purpose of promoting ad valorem appraisal professionalism and the Scholarship Fund is available to all IAAO members who need financial assistance to attend IAAO educational activities, including the Prep & Trial Seminar.

The application can be found on the IAAO website under Membership, then Scholarships and must be submitted no later than 30 days prior to the event. The maximum award for this seminar is \$1,250 per recipient. Contact [Toni Eichholz with questions at eichholz@iaao.org](mailto:Toni.Eichholz@iaao.org).

Speaker Resources

Seminar speakers will be able to download the event PowerPoint template for use in preparing materials for the event.



IAAO

INTERNATIONAL ASSOCIATION
of ASSESSING OFFICERS

Valuing the World

ABOUT IAAO

The International Association of Assessing Officers (IAAO), established in 1934, is one of the world's largest and most comprehensive associations for assessment professionals. The IAAO mission is to promote innovation and excellence in property appraisal and property tax policy and administration through professional development, education, research, and technical assistance. IAAO members abide by a strict code of ethics to ensure public trust, and the association is a founding member of The Appraisal Foundation.

IAAO welcomes students and members of any sex, age, race, color, nationality, or ethnic origin. It does not discriminate on the basis of sex, age, race, color, nationality, or ethnic origin in the administration of its policies. IAAO complies with the Americans with Disabilities Act.

IAAO membership information is available from IAAO headquarters. Call the Membership Department at 816-701-8100, email membership@iaao.org, or visit iaao.org.

The statements made or views expressed by speakers at this seminar do not necessarily represent a policy position of the International Association of Assessing Officers.

IAAO LEGAL COMMITTEE

IAAO's Legal Committee supports the mission and commitments of IAAO by offering the unique perspectives of members who are primarily involved or interested in legal issues. The Legal Committee organizes the annual IAAO Legal Seminar and the Preparation and Trial of the Property Tax Assessment Appeal Seminar.

Register today at www.iaao.org/prepandtrialregister