



BRIAN LEE, ASA, CEIV, CFA

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Brian is a Director in our Irvine office. He has nearly 15 years of valuation experience involving business enterprises, intangible assets, stock options, warrants, notes, and preferred securities for financial reporting, tax, transactions, and litigation purposes.

Brian's experience also includes providing fairness and solvency opinions in connection with various transactions and performing strategic planning analysis, lost earnings calculations, economic damage analysis, statistical analysis, and valuation of interests in corporations and general and limited partnerships.

Brian specializes in the valuation of loan portfolios, core deposit customer relationship intangible assets, time deposits, FHLB advances, trust preferred securities, subordinated debentures, indemnification assets, and other financial assets and liabilities of financial institutions.

Brian has had relevant experience in the following industries: apparel, banking, construction, E-commerce, engineering, healthcare, insurance, life science, limited and full service restaurants, logistics, manufacturing, retail, technology, and wholesale distribution.

Prior to joining Globalview Advisors, Brian was a Senior Manager at Crowe Horwath, LLP, where he performed valuation analyses for both publicly traded and privately held companies. Previously, Brian was also employed with Duff & Phelps, LLC.

Brian received his BS in Finance from the California State University of Northridge. He is an accredited senior Member of the *American Society of Appraisers (ASA)* in the business valuation discipline and holds the Certified in Entity and Intangible Valuations™ (CEIV) Credential designation. Brian is also a Chartered Financial Analyst (CFA®) charterholder.