

# Louis J. Pereira, MBA, CBA, ASA, CVA, CBI

## Summary

Lou Pereira has over 30 years of relevant business valuation experience, including 12 years in corporate mergers and acquisitions, and 20 years in private practice. Lou earned an MBA and holds CBA, ASA, CVA, and CBI credentials. He is President of Merrimack Business Appraisers, a faculty member of the American Institute of Certified Public Accountants, has taught degree-credited courses in Accounting and Finance at the university level, and testified as a business valuation expert in multiple venues. He is an active member of the Board of Directors of the New England Business Brokers Association, a past member of the Board of Governors of the IBA, and member of the Board of Governors, course developer, instructor, and lead subject matter expert for the International Business Brokers Association.

## Professional Experience

**Merrimack Business Appraisers, LLC.**, 2007 – Present. Principal in a business appraisal firm specializing in valuation of privately held business entities for ownership transitions, gift and estate tax, shareholder dispute resolution, divorce settlement, ESOP/409A, and other matters.

**Herold-Lambert Group, Inc.**, 2003 – 2020. President of a merger and acquisition advisory firm. Consult with buyers and sellers of small and mid-sized companies to value, package, market and sell the companies. Develop comprehensive business offering prospectuses including economic, market and financial analysis and value justifications; completed over 120 business valuations of small and mid-size companies, LOIs and Purchase & Sales Agreements across multiple industries; present, defend and negotiate analysis and conclusions with principals, accountants, attorneys, and other stakeholders.

**Hands On Technology, Inc.**, Vice-President. Primary marketing and business development executive for a national software skills training company. Developed and implemented business plan and managed strategic alliances and marketing channels to drive customer acquisition and revenue growth.

**Ad Pepper Media International**, Chief Operating Officer. Launched American division of international marketing services company. Developed and implemented the company's operating and financial plans for entry into the American Internet market. Managed company-wide analysis, planning and implementation initiatives; developed acquisitions and alliances; built and managed a nationwide sales, marketing and production force of 48 professionals across offices in New York, Los Angeles, San Francisco and Miami. Managed \$10.2M operating budget; achieved 200% performance against objective. Key executive in executing an Initial Public Offering (IPO) which raised \$48 million. Member, Board of Directors, Ad Pepper Media USA.

**Bell Atlantic Information Solutions Group**, Director, International Business Development. Held key roles in building new division/holding company from \$0 to \$68M; investment monetized for 567% ROI. Managed project teams in identifying, negotiating, and closing startup ventures and acquisitions in Asia and Europe. Held leadership roles in over a dozen deals ranging from \$500K to over \$200M; handled all aspects of deals including: overall project management, target identification, partner engagement, financial modeling and analysis, valuation, due diligence, deal structuring, contract negotiations, financing, business plan preparation, executive team recruitment, launch and integration. Member, Board of Directors, Shanghai Advertising Sales Company.

**US Army** and **Massachusetts Army National Guard**, Veteran

**NH Real Estate Commission**, Licensed Real Estate Agent

**Commonwealth of Massachusetts**, Division of Professional Licensure, Licensed Real Estate Agent

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## Professional Designations

### Certified Business Appraiser (CBA)

from the Institute of Business Appraisers (IBA); fewer than 12 in New England and less than 200 across the country have this designation.

### Accredited Senior Appraiser (ASA)

from the American Society of Appraisers (ASA); profession's preeminent standard that requires 10,000 hours in business valuation and the only professional designation to comply with the USPAP.

### Certified Valuation Analyst (CVA)

from the National Association of Certified Valuators and Analysis (NACVA)

### Certified Business Intermediary (CBI)

from the International Business Brokers Association (IBBA)



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## Education/ Academics

### **Master of Business Administration**

Babson College, Wellesley, MA (1987).

### **Bachelor of Science**

Business Administration, summa cum laude,  
Fitchburg State University, Fitchburg, MA (1983).

### **Adjunct Faculty Member**

Franklin Pierce College, Salem, NH.  
Taught degree credited business courses in International  
Business and Market Research (1992-1993).

### **Visiting Instructor**

Graduate & Continuing Education, Fitchburg State University, Fitchburg, MA.  
Taught degree credited graduate and undergraduate business courses in  
Accounting and Finance (2007-2021).

### **Adjunct Instructor**

Continuing Education, Southern New Hampshire University, Manchester, NH  
Taught degree credited business courses in Finance (2007-2010).

## Boards & Committees

### **Board Member**

New England Business Brokers Association,  
North Attleboro, MA.

### **Past President & Current Board Member**

Merrimack Valley Estate Planning Council,  
Andover, MA.

### **Past Board Member & Current Member**

Essex County Estate Planning Council,  
Peabody, MA.

### **Member**

New Hampshire Estate Planning Council,  
Concord, NH.

## Expert Testimony

**American Arbitration Association**, Boston, MA, September 10 and November 11, 2021

**Norfolk Probate and Family Court**, Canton, MA, May 16, 2018

**Essex Probate and Family Court**, Salem, MA, August 19, 2016

**Middlesex Probate and Family Court**, Cambridge, MA, July 13, 2015

**Essex County Superior Court**, Lawrence, MA, April 23, 24, & 29, 2015

**Private Arbitration**, Salem, MA, April 9, 2015

**Essex Probate and Family Court**, Salem, MA, March 31, 2015

**American Arbitration Association**, Boston, MA, May 1, 2013

**Middlesex Probate and Family Court**, Cambridge, MA, March 13, 2012

**Norfolk Probate and Family Court**, Canton, MA, November 14, 2011

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