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**Risk  
Management  
Association**  
ORANGE COUNTY CHAPTER

**AVANT**  
ADVISORY GROUP  
SECURING VALUE

## Case Study: A Middle Market Autopsy, Mistakes Made; Lessons Learned

In this RMA OC Educational workshop, Jim Davidson provides an in-depth investigation into the warning signs for Middle Market lending.

### February Lunch & Learn

Wednesday, February 26, 2025

#### Lunch/Networking

11:30 - 12:00pm

#### Program/Q & A

12:00 - 1:00pm

#### Price

\$20 \*Price includes delivered lunch during the workshop and validated parking.

#### Location

Comerica Training Room  
611 Anton Blvd #100, Costa  
Mesa, CA 92626

[Training room located inside Comerica Bank lobby doors]

#### Virtual Option

Zoom link available  
to attend virtually  
upon payment.

### Featuring Guest Speaker: Jim Davidson with Avant Advisory Group



**Jim Davidson**  
President & Founder  
Avant Advisory Group

**[CLICK HERE TO REGISTER!](#)**

Join RMA Orange County and Jim Davidson of Avant Advisory Group for a detailed workshop on the key takeaways from lessons learned post-acquisition. Learn how to recognize potential over valuation resulting from a defective CPA audit and financial diligence/Q of E that missed multiple red flags, fraud indicators and misstated and misleading information.

Topics discussed will be based on a real case study of an acquisition fraud with multiple diligence errors and oversights of both the professionals and the sophisticated private equity investors involved in the deal. An appropriately performed diligence might have informed the investors to kill the deal but didn't!

Jim Davidson is president and founder of Avant Advisory Group, an operationally focused financial advisory firm. Jim has served in senior executive positions at both public and private companies. He served for 10 years consulting for Big Four CPA firm PricewaterhouseCoopers, and has now transitioned to the private sector.

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QUESTIONS? CONTACT: Vicki Phillipy | [vphillipy@rmaoc.org](mailto:vphillipy@rmaoc.org)