

Donna J. Walker, CFA, FASA

Principal and Founding Shareholder



Donna Walker has been engaged in business appraisals since 1984. She specializes in estate and gift tax valuations, ESOP valuations and financial advisory services, the valuation of limited partnership interests and other pass through entities, litigation support services, and has testified in various litigation matters, including in U.S. Tax Court.

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Prior to founding Columbia Financial Advisors, Inc. in 1992, Ms. Walker was a Principal at Willamette Management Associates, Inc. where she focused on business appraisal and financial advisory services for ESOPs estate and gift tax and litigation support purposes.

Ms. Walker is an Accredited Senior Appraiser of the American Society of Appraisers designated in Business Valuation, and a Chartered Financial Analyst. She is a current member of the ASA Business Valuation Discipline Committee. Ms. Walker earned her Bachelor of Arts degree with honors from the University of Wisconsin, Madison in 1975. She is a member of the ESOP Association, the National Center for Employee Ownership, the CFA Institute, and the CFA Society of Portland. She is past president of the American Society of Appraisers and is a member of the American Society of Appraiser's College of Fellows. Ms. Walker is a course developer for the ASA business valuation course on valuing ESOP shares and is a course instructor. She is a frequent speaker, lecturer, instructor, and author on matters involving valuation. Ms. Walker has testified in U.S. Tax Court.

Ms Walker's knowledge, experience and dedication to the business appraisal profession are borne through her commitment to the American Society of Appraisers as follows:

- College of Fellows, 2007 – present
- Current Member, Business Valuation Committee
- International President, 2005-2006
- International Vice President, 2004-2005
- International Treasurer/Secretary, 2003-2004
- Member, Business Valuation Committee, 1998 -2001
- Course Developer and Instructor
 - “Valuing ESOP Shares”
- Past Chair, International Admission and Membership Committee
- Past Regional Governor
- Past President, Portland Chapter