

Nainesh Shah, CFA, CVA

Co-Founder & Director of Valuation Advisory

Complete Advisors – New York

Nainesh Shah is the Co-Founder and Director of Valuation Advisory at Complete Advisors, where he specializes in the valuation of complex and intangible assets for tax, estate planning, and transactions.

With over 30 years of experience, Nainesh has developed deep expertise across a wide range of asset classes, including public and private companies, private equity interests, real estate, patents, and other intellectual property. His work frequently supports gift and estate tax reporting, succession planning, buy-sell arrangements, and M&A transactions.

Nainesh is particularly known for his ability to address highly complex valuation challenges, including multi-tiered ownership structures, hard-to-value assets, and situations involving significant uncertainty. He combines rigorous analysis with a practical understanding of investment, risk management, and real-world market dynamics, delivering conclusions that are both defensible and clearly communicated to attorneys, CPAs, business owners, and advisors.

Prior to co-founding Complete Advisors, Nainesh spent over 20 years at Roosevelt Investments, where he served as a Portfolio Manager and Senior Securities Analyst, contributing to investment strategy, macroeconomic analysis, and thematic portfolio construction.

Beyond his client work, Nainesh is an active leader in the valuation profession. He serves as Chair of NACVA's Artificial Intelligence and Machine Learning Commission and sits on NACVA's Executive Advisory Board. He is also a frequent conference speaker and has delivered more than 200 presentations to attorneys, CPAs, and financial advisors.

Nainesh is a regular contributor to leading industry publications, including Trust & Estate, The CPA Journal, and the Journal of Accountancy, and has been recognized for his contributions to the profession, including receiving NACVA's Richard Claywell Outstanding Member Award.

He holds an MBA in Finance from Dalhousie University and a Bachelor of Technology from MS University, and he is both a Chartered Financial Analyst (CFA) charterholder and a Certified Valuation Analyst (CVA).