



# VALUATIONS

## The Value of Your Business Should Not Be Overlooked

**The truth is in the details** and, with business valuations, those details could mean increased **tax liability for your business**. To truly utilize valuation as a tool to improve your business, determining an estimated fair market value is just the first step. The real key is acting on that knowledge.

Our experience gained over the years as **Certified Valuation Analysts** has given us the vital ability to provide you with a sound business valuation based on proven and accepted methods. Small business owners frequently make decisions that are not short-term in nature, so it is incredibly useful to be able to rely on an appraisal process to help make better long-term choices. Working with a **certified team** is invaluable when determining the value of your business. Our accountants, who specialize in this service, are readily available to consult with you in order to provide you with a solution that best suits your needs. In the world of business valuation consultation, we believe that **a well-prepared valuation is the cornerstone to finding peace of mind and success**.





## How Do We Serve **Clients Like You?**

Business  
succession  
planning

Buy-sell  
agreements

Estate and  
gift tax

Mergers and  
acquisitions

Stock-based  
compensation

## **Services** We Provide

**BUSINESS  
VALUATIONS**



**CALCULATION OF  
VALUE ENGAGEMENTS**



**FORECASTS AND  
PROJECTIONS**



**TRANSACTION  
CONSULTING**



### **EXPERTISE**

Our valuations are often used by clients to establish a value for business transition planning that can take the form of an outright sale, next generation ownership, ESOP, etc.

We provided valuation services to a \$220 million manufacturer in order to assist them in establishing a share value for their shareholder buy-sell agreement.

### **Professional Relationships**

- National Association of Certified Valuators and Analysts

### **DID YOU KNOW?**

The professionals in our practice group hold the **Certified Valuation Analyst (CVA)** credential, which requires them to re-certify every three years through continuing professional education to enhance their knowledge and maintain a level of competence that is current with the progress of the industry.