

Our Business Valuation Process:

Business Valuation are usually completed within 2-3 weeks.

Business Valuation Introduction

- Discuss and understand situation.
- Review options and goals.
- Sign Engagement Agreement.



Engagement Meeting

- Review: Income Statements & Balance Sheets, Earning power, Industry/economic research, and market comparables.
- Share valuation methodologies
- Conduct valuation analysis (3 approaches).
- Analyze non-operating or excess assets.
- Apply applicable discounts / premium.



Issue Draft Report

- Deliver Draft Report.
- Present results including reconciliation & conclusion of value.
- Make revisions where warranted.



Final Report Meeting

- Present final report.
- Answer questions.
- Provide our insights.
- Share Next Steps options.

All business valuations conducted by CPAs who are Certified in Business Valuation by the NACVA or AICPA. Our Valuations meet SBA, IRS and USPAP requirements as applicable.



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