

# How Providing Clarity and an Understanding of Value Led to Action

How Brian and his Team Used Business Valuation to Turn Prospects into Clients



## Case Study:

Brian Baum,  
Financial Advisor,  
Interchange Capital Partners

## Industry of Business Owner:

Trucking

## BizEquity Business Value:

\$192,353,191

## Business Owners:

4

## About Brian Baum, Financial Advisor, Interchange Capital Partners

As part of Interchange Capital Partners, Brian is committed to helping private business owners navigate transitions. When working with business owners, he strives to maximize business value, mitigate tax burdens, and create lifetime cash flow for clients.

## Opportunity

Brian began working with this family-owned trucking business by answering the question, "What's Your Business Worth?" The four owners had never before agreed on a business value, and a BizEquity valuation report provided some much-needed clarity. With a concrete valuation number, the owners agreed to begin developing comprehensive financial plans with Brian and Interchange Capital Partners.



\$125,000 corporate-sponsored financial planning fee



Buy-sell insurance coverage increase from \$5 million to \$30 million



10% fee from investment banking referral



\$160 million of total AUM

"Showing the BizEquity Valuation to the four owners got them on the same page and stopped them from fighting with each other over the valuation."

- Brian Baum, Interchange Capital Partners