



## Understanding the **VALUE IN VALUATION**

If you are like 98% of business owners in the United States, you probably haven't had an appropriate valuation done on your business. That's most likely because the traditional valuation process is expensive, time consuming, and intrusive. As a business owner you deserve to know the value of your most prized asset. We've partnered with BizEquity to provide you with a complimentary valuation of your business and to offer financial advice around that valuation.

I understand that as a business owner you face far more complexities and concerns than just looking to sell your business. Some of which may include:

- Succession planning
- Buy-sell agreement & funding
- 401(k) plan for employees
- Benefits
- Risk management
- Retirement planning
- Capital Structure
- Personal financial plan for owners
- Personal financial planning for employees
- Payroll
- Tax management

I would love to schedule a complimentary valuation with you to not only show you the value of your business, but to also ensure you are getting the proper financial advice around that valuation figure. Contact me at the number below to set-up a time to connect.

## Partnership with BizEquity

Through our partnership with BizEquity you will receive:



### 29 Page Business Valuation Report

The Importance of Valuation  
BizEquity's Methodology  
4 Conclusions of Value  
12 Key Performance Indicators  
Next Steps Based on Your Goals

### 2 Page Insurance Report

Buy-Sell and Key Person Insurance Figures  
Based on Your Industry Value

98%

of businesses do not  
value themselves  
annually

IBIS World Industry Report OD4797 Business  
Valuation Firms in the US June 2014

78%

of business owners  
expect to fund their  
retirement through the  
sale of their business

CNBC

40%

of business owners do  
not have life insurance.

LIMRA