



VALUATION SERVICES

GROWTH THROUGH KNOWLEDGE

Performing a formal valuation of your business is the first step for any growth or exit strategy. Business value should inform all important decisions and help you create a path forward with intention, and a successful path should include concrete goals anchored to a clear and accurate starting point.

Market-Based Valuation

The FP Transitions Comprehensive Valuation Report uses the industry's largest comparable sales database of financial services practices to deliver a neutral and accurate estimate of value. A market-based valuation can be used for the purpose of transferring clients from one business to another, as well as for tracking and monitoring a practice's value over time. A formal, equity-based valuation can be used by all owners of a business—current and prospective—as a business building and planning tool, and to learn what drives value and how it can be increased and improved.

10 REASONS TO PROFESSIONALLY VALUE YOUR BUSINESS

1. Increase value
2. Benchmark reporting
3. Continuity planning
4. Exit planning
5. Acquisition
6. External sale
7. Compensation
8. Internal transfer
9. Mergers
10. Litigation

Certified Business Appraisal

Certain circumstances call for a more in-depth review and analysis. Our team of accredited professionals can provide a valuation report matched to your specific purpose. A custom-tailored certified business appraisal can apply to a variety of purposes including, but not limited to:

- Internal or minority sales
- Divorce
- Mergers
- Legal disputes or dissolutions
- Taxation
- Charitable gifting

Litigation Support

Our certified appraisers are experienced in the litigation process and can support the accuracy of our work in the event of a legal dispute of value. When needed, we provide assistance in a variety of dispute resolution processes including mediation, arbitration, and court proceedings, and can testify as to the validity of a Certified Business Appraisal performed by FP Transitions.

Appraisal Review

Our valuation and appraisal team can examine any valuation or value opinion prepared by a party other than FP Transitions. We review the documentation and determination of value to identify any deficiencies that may not withstand the rigors of a legal proceeding. Our analysis will help you determine whether a second opinion of value should be obtained, or if the standing value conclusion is acceptable.

Visit fptransitions.com/valuations for more information about our valuation services.

