

# Valuation Principles Grow Success

[www.CertifiedBusinessAppraisal.com](http://www.CertifiedBusinessAppraisal.com)

*Where Valuation Specialization Makes a Difference for You.*

## **Business Owner's Glide Path to Succession and Exiting**

Coordinate Business and Personal Succession and Transition Goals  
Continuity of Operations, COO<sup>SM</sup> and Ready to Sell<sup>SM</sup> Process Checks  
Know Your Right Way to Sell, and Get Paid  
Who Is Your Best Buyer? What Is A Fair Deal? Due Diligence?  
Deal Structure Valuation, DSV<sup>SM</sup> Will the Price and Terms Work?  
Stress Tests to Organize Buy-Sell Agreements, Succession and Transition  
Selling Owner(s), and Remaining Owners and Managers  
Know the Deal Killers for External, Internal, and Family Buyers  
Family Business Succession and Transition Options (Most Asked About)

## **Specific Strategies and Tactics for Your Firm's Growth**

Growth Process Systems, GPS<sup>SM</sup> 186 Proven Business System Actions  
Strategic Process Tactics for a Brighter Future, See Page 2  
53 Benefits of Valuing Your Company Now, Plus 7 More When You Sell  
Performance Indicators: Financial, Operating, Intellectual Property (IP)  
Simplify Your Work Flow and Grow Your Scalability, Do More With Less

## **Valuing Business Efficiencies and Effectiveness**

What, When and Why – Needs Analysis for New Operating Ideas  
Discover Solutions for the 37 Questions Business Owners Ask Most  
Valuation and Financial Analysis: Purpose, Use, and Report Level  
Know Exactly What Is Driving Your Company's Value  
WW-WN<sup>SM</sup> - Assess Strengths, Weakness, Opportunities, Threats  
Learn Your Strongest Value Drivers, and Most Costly Selling Risks  
2<sup>nd</sup> Opinions for Your Goals, Other's Advice, or Build a 'Plan B'

## **Divorce Litigation and Alternative Dispute Resolution, ADR**

What Is It Worth? Preparation Steps for Data and Document Gathering  
Hidden Money and Assets? Prenuptial Tracing Commingled Assets?  
Compensation, Fringe Benefits, and Retirement Accounts Appraisal  
Valuation Certified Reports for Litigation; Why a "Conclusion of Value"  
Critiques of Other's Business Valuations, and Consulting  
Deposition Questions for Opposing Financial Analyses

**For Any Challenge Receive Free Your Best Next-Step<sup>SM</sup> Simply Call 513-266-3226**

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## Specialized Assessment and Solution Topics

- **Marketing and Sales Tactics**
  - Branding, What Kind & Why?
  - Business Development Map
  - Target Client Identification
  - Market Mining Steps
  - Marketing Plan Execution
  - Sales, The One Question
- **Operating Fundamentals**
  - Accounting and Tax
  - The Right Business Plan
  - Compensation Packages
  - Fees, Pricing, and Billing
  - Long-Term Financial Planning
  - HR Groups and Teams
  - HR Internal Coordination
  - Location Selection/Change
  - Office Handbook
  - Office Workflow Simplified
  - Owner's Manual–Sold Secret
- **Innovative Management**
  - Turn-Key Business Systems
  - Document Management
  - Practices, Policies and Procedures that Work
  - Risk Management and Regulation Compliance
- **Retirement**
  - Income to Last a Lifetime
  - Personal Financial Plan
  - Retirement Plan Mix
  - Tax Advantaged Choices
- **Strategic Planning**
  - Approach Assessments
  - Branch Locations
  - Business Development
  - Business Models
  - Growth and Expansion
  - Intellectual Property, IP
  - Key Person Incentives
  - Leadership Path
  - Owner/Partner Track
  - Profitability Quality Rating
  - Recruiting Right
- **Succession and Continuity**
  - External and Internal Sale
  - Management Succession
  - Owner Exit Process
  - Solo and Self-Employed
  - Transitioning, Out and Happy
- **Technology**
  - Maximizing Use
  - Misuse and Mistakes
  - Select, Implement, Integrate
- **Trends, Industry and Economic**
  - Coming New Opportunities
  - Specific Niche' Future Outlook
  - Research Reports, Drill-Down
  - Threats and Challenges
- **Valuation, Sale, and M&A**
  - Data and Document Vault
  - 170% Price Increase Process

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