VALUATION EXPERTS - Sample Profiles

MY BUSINESS EXITTEAM

Unique ID	728758952	736984491	738970207
Firm Location (City)	Swampscott	Wayland	Boston
Firm Location (State)	MA	MA	MA
Firm Location (Zip)			
Your firm's geographic range (where you will accept clients from)	New England and Mid-Atlantic states	North America	Massachusetts typically and the rest of New England occasionally
General description of your firm's offerings	Our firm is a boutique business valuation, litigation support, and financial consulting firm focused on working with individuals, owners of privately held companies, and their trusted advisers.	We provide business valuation and real estate appraisal services.	Forensic accounting and business valuations
Specific services or niches your firm specializes in	We work with business owners and their advisers to help them understand the value of their business as they contemplate various transitions in both their personal and business lives. Whether buying out a business partner, offering shares to up-and-coming employees, passing the business on to the next generation of family, or selling to a third party, recognizing the value of your business is a powerful tool to ensure your planning goals have been met.	We specialize in the valuation for financial reporting purposes, estate gift and tax, M&A and other tax related purposes. We have a particularly strong niche in performing valuations for IRC 409a. We are particularly strong in valuation of companies with complex capital structure that involve convertible debt securities, preferred shares, warrants, and stock options.	Business valuation engagements include M&A, divorce, IRS, and other matters such as shareholder dispute. ||Financial forensics include earnings quality assessments, data analytics, fraud investigations, fiduciary violations, criminal, and other financial/non-financial analysis
How your firm gets paid (Hourly, Modular, Commission, % of Sale Price, etc.)	Our firm gets paid either on a fixed-fee basis or on an hourly basis depending upon the valuation service being provided.	Majority of the work we perform is on a fixed fee basis. We may offer an hourly rate valuation projects related to litigation related engagements.	Hourly
Do you do free initial consultations? 30 mins, 60 mins?	60 mins	Yes, up to 60 minutes.	Yes, up to 60 minutes
Number of employees in your firm	Sole practitioner	Self practitioner	Our department has around 10 though the firm has approximately 120
What makes your firm unique?	I have over 30 years of business valuation, including many years at a big-four CPA firm, an economic consulting firm, and a regional CPA firm. I have a breadth of valuation experience ranging from high profile litigation matters such as shareholder disputes and divorces, to succession and estate planning. Working as a member of a team of professionals, she brings an exceptional level of experience, dedication, and perspective to her clients, enabling them to meet their objectives in highly stressful, emotional situations.	Our deliverables are uniquely tailored to client specific needs. We are capable of taking on a variety of valuation assignments including valuation for gift and estate purposes, litigation support, 409A and ASC 718 stock option valuations, minority and control equity ownership interests, equity buyouts, goodwill and intangible asset impairment testing, intangible asset valuations, discount for lack of marketability studies and valuation of intellectual property.	We practice what we preach. Our practitioners teach valuation and financial forensics for credentialing organizations such as NACVA. We are also seasoned professionals with testimony experience.
Minimum Client size (# of Employees / Revenue / EBITDA etc.)	Throughout my career, I have worked with business owners of companies with revenues from $500,000 to $2 billion.	Typically our fee is cost prohibitive to clients that generate less than $1.0 million in revenue.	Most business owners want to know their company's value. Our clients should have a specific need (i.e., for a potential transaction) rather than general curiosity as there is a fair amount of due diligence involved to derive the answer. Our typical clents have revenues in excess of $1 million.
Industries Services (All or Specific)	I do not perform valuations of financial institutions.	All. We have significant experience in the valuation of early stage companies, information technology, software, internet and biotechnology industries.	We service many businesses that sell products or services though have specialties in construction, IT, manufacturing, and those involving real estate.
Other criteria in choosing your prospects			Warm referrals from attorneys or CPAs are preferred as the quality of the professionals surrounding the business is often an indicator of the quality of the records.
Number of years experience in your field	>30	>20	27
Industry Designations (CFP, CLA, CPA etc.)	Accredited Senior Appraiser (ASA), Certified Fraud Examiner (CFE), Certified Divorce Financial Analyst (CDFA), Financial Neutral in Collaborative Law Matters, Trained in Mediation	ASA - Accredited Senior Appraiser	CPA, CMA, CFM, CVA, MAFF
Best times to contact you			
Preferred Communication Methods	Phone|Email|Zoom / Skype etc.	In Person|Phone|Email|Text|Zoom / Skype etc.	In Person|Phone|Zoom / Skype etc.
Elevator Pitch / Anything prospective clients should know about you?		We provide a complete range of valuation services to privately owned companies. Our clients appreciate our ability to address challenges from multiple angles, quickly process new information and maintain clear communication throughout the engagement.	I find the money people try to hide.