

# An innovative approach to business valuations



Wealth Management

in collaboration with BizEquity

We've invested in technology to help ensure our business owner clients have the facts needed to make sound planning decisions. BizEquity's innovative technology harnesses the power of big data to deliver accurate and efficient business valuations. The tool is easy to use, but backed by a sophisticated engine that has been trusted by millions of business owners worldwide.

We've incorporated the most **stringent security measures** to ensure privacy of data.

**2**

**3** Watch your progress live. Our valuation tracker changes as you enter data.

**4** Learn how your company compares to others. The "Did You Know" feature provides helpful benchmarking data.

**5** You don't have to complete the exercise in one sitting. Save your progress and come back later.

**6** You can send a link to your CPA, Accountant or Business Manager with a request to complete the data.

**7** Dynamic sliders demonstrate how business changes affect your business value.

**1** 7-Step Process generates a comprehensive business valuation in a fraction of the time compared to traditional methods.

**6** How is your business growing?

YOUR ESTIMATED BUSINESS VALUE **\$8,152,050**

Projected Revenue Growth  
Annualized Growth Rate

Long Term EBITDA Margin  
EBITDA = Earnings Before Interest Taxes Depreciation & Amortization

Percent of Business Recurring

Do you have Intellectual Property, including Trade Secrets or Patents?  Yes  No

Did You Know?  
Close to 400,000 new businesses are created each year

Save for Later

Delegate

Back Next Step



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