

# An innovative approach to business valuations

In collaboration with BizEquity



Wealth Management

We've invested in technology to help make sure 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.

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

**2** We've incorporated the most **stringent security measures** to help confirm privacy of data.

**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.

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20-86-04212\_8668 (01/21)