



Valuations for Gifts, Trusts, & Estate Planning



Business Valuations

- Purchase or Sale of A Business
- Gifts, Trusts, and Estate Planning
- Fairness Opinions
- ESOPs
- Intangible Assets
- Stock Options

Worried about the IRS and your estate?

Your attorney is handling the structure of your estate plan. Your CPA is making sure the accounting is handled correctly. But who can provide you the independent valuation for your gift, trust, or estate?

An unbiased, independent opinion of value will help you:

- ***Know that your valuation is market-based***
- ***Ensure the valuation accounts for current IRS guidelines and recent court rulings***
- ***Provide an independent, unbiased valuation to the IRS, if needed***

Our team has extensive experience valuing closely-held businesses for gifts, trusts, and estates. We provide the information and documentation necessary to respond to any IRS inquiry, ultimately alleviating your worries about the IRS and your estate.

Let us know how we can help you.



The expertise you need, when you need it.