



What Our Client Says

“As a third-generation president of our family-owned business, I’m especially aware of the importance of proper estate planning and gifting. I rely on Eide Bailly to provide an accurate valuation which helps us stay informed on the status of our business.”

*~ Shannon McQuade, President
McQuade Distributing*

What role does a business valuation play in wealth management?

For many business owners, the value of their business represents a considerable portion of their overall assets. Because the business value is such a significant component of an owner’s financial situation, the proper determination of its value forms the cornerstone of all wealth management planning strategies. However, determining an accurate value of the business can be very challenging, especially when valuations may be scrutinized by outside parties.

Eide Bailly’s valuation team will work with you to understand your situation and analyze the information necessary for proper valuation of your business. You will have access to an accredited team of specialists with significant experience in all aspects of determining a business’ value. We will work closely with you, your outside advisors and appropriate members of your management team to develop this cornerstone of your wealth management planning.

What is Eide Bailly’s approach to business valuation?

Working side-by side with other members of the wealth management team, our approach starts with identifying and understanding your business and personal objectives. We will work with you to better understand what you would like to accomplish with a valuation, your long- and short-term plans for transitioning the business and your overall financial goals. Whether you are looking to maximize the value of the business for sale to a third party or take advantage of minority interest discounts for gifting, our valuation team will work with you to determine the steps that can make these objectives a reality.

An important role in our valuation process includes secondary research of the financial and non-financial issues that may impact your company’s value, including key risk areas, drivers of value and macro- and micro-economic indicators. Additionally, our professionals analyze benchmarking data related to market values of comparable companies and recent similar transactions, and incorporate this information into the valuation. Research, analysis and interviews with your management team and other advisors provide further insight into the factors that may influence the company’s value.

Why should I choose Eide Bailly?

Determining the value of your business is just one important component to your overall wealth management. By utilizing a holistic approach to wealth management—that includes a team of valuation specialists, tax advisors, financial advisors, estate planners and business advisors—we help ensure your wealth management issues are viewed in their entirety and solutions are developed in alignment with your needs. Our team’s commitment to helping you achieve your financial, personal and charitable objectives is the true Eide Bailly difference.

Experience the Eide Bailly Difference

800.497.4303 | www.eidebailly.com





Director's Perspective

“Our goal is to provide you with a valuation that is objective, timely and cost-efficient, while firmly upholding compliance regulations and confidentiality. The valuation can then serve as an integral component of your overall wealth management plan.”

Chad Flanagan, CPA
Director of Business Valuation
Eide Bailly LLP

Business Valuation Opportunities

Eide Bailly's business valuation team will work with you to define your business and personal objectives, while developing specific strategies to achieve them. The following is a sampling of types of business valuations that may be considered to help achieve your goals.

Compliance Valuations

- Estate and Gift Taxes
- Non-Cash Charitable Contributions
- S Corporation Elections
- Corporate Reorganization

Transaction Valuations

- Buy/Sell Agreements
- Mergers and Acquisitions
- Shareholder Redemptions