



## Engage business owners with a complimentary business valuation

### Your sales opportunity

#### Business owners who:

- Wish to know an approximate value of their business
- May be postponing decisions because they lack this knowledge
- Don't want to spend time and money on a certified appraisal

### Your solution: Offer a business valuation

In many cases, a business owner's most valuable asset is their business. Knowing the value of that asset is critical to proper business planning and achieving personal financial goals. By harnessing the power of data and the latest technology, we can quickly deliver an efficient business valuation. So you can help clients move their plans forward.

### Four valuable features

1. Informal valuation providing a general estimate of fair market value to help with business succession, estate planning and retirement analysis needs
2. Easy-to-use process
3. Receive valuation reports in days, not weeks, once all pertinent information is obtained
4. Valuation service is complimentary and with no obligation.



### Learn more

Call our Advanced Sales Team at  
**(678)322-3040**

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## Target client

### Business owners who are:

- Implementing or updating buy-sell arrangements
- Building strategies for eventual exit from the business and transition of ownership
- Developing strategies for retirement
- Writing their estate plan

## How it works

### Step 1: Initial case consultation

Call or email our Advanced Sales Team at: (678)322-3040  
Info@fortressbrokerage.com to discuss our valuation process.

### Step 2: Data gathering

Complete the required fact finder and gather three years of company tax returns and financial statements (balance sheets and profit and loss statements with a December 31 year end).

Email the fact finder and financial data, with the name of the company in the subject line to [Info@fortressbrokerage.com](mailto:Info@fortressbrokerage.com)

**Be sure to enter the business name in the subject line.** Timely completion relies on providing all necessary financial information.

### Step 3: Valuation report and review

Once the data has been entered, we will contact you to schedule a follow-up call to review the report and discuss sales opportunities.

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## Business valuations can help with:

- Placing buy-sell cases
  - Meeting estate planning analysis needs
  - Implementing important financial or business strategies that might otherwise be delayed
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