

# 9 Reasons Your Business or Family May Need a Valuation

Business valuation reports can be required for several unique purposes and the approach taken in determining value considers your needs and budget.

		<b>Conclusion of Value Report</b>	<b>Calculation of Value Report</b>	<b>Range of Value Report</b>
		<ul style="list-style-type: none"> <li>▶ Highly detailed</li> <li>▶ Covers most transactions</li> <li>▶ Usually the most expensive</li> </ul>	<ul style="list-style-type: none"> <li>▶ Lighter touch that typically focuses on buy/sell transactions</li> </ul>	<ul style="list-style-type: none"> <li>▶ Summary of range of value for owners and investors</li> <li>▶ Usually the least expensive</li> </ul>
M&A				
<b>1</b>	Potential M & A transactions on the buy or sell side of the transaction	X	X	X
<b>2</b>	The purchase price allocation related to an acquisition	X	X	
<b>3</b>	Establishing a value for the execution of a buy/sell agreement	X	X	X
Business Matters & Growth				
<b>4</b>	Satisfying the requirements of the SBA for a business acquisition loan	X	X	
<b>5</b>	Supporting issues arising out of shareholder disputes or corporate disputes	X	X	X
<b>6</b>	Supporting the enterprise value related to stock compensation plans, such as 409A valuations	X	X	
<b>7</b>	Succession planning	X	X	
Gift & Estate				
<b>8</b>	Supporting issues arising out of matrimonial matters or divorce	X	X	X
<b>9</b>	Estate, gift and income tax transactions and regulatory compliance	X	X	

## The valuation process

1. LGA's experienced valuation team listens to your needs to determine the objective and purpose for the valuation report.
2. Through additional discussion, we tailor a process that works for you and provide value-added guidance throughout that process.
3. You'll receive timely delivery of a quality work product done by credentialed professionals that will stand up to scrutiny by outside parties.

By working with a valuation practice that is part of a full-service CPA firm, you'll benefit from multidisciplinary expertise, enabling us to focus not just on the science of the valuation, but also on the art of the process. In addition, we can help you with post transaction services so there's continuity of relationships and knowledge.

To learn more about LGA's Business Valuation Practice Group or to discuss your need for a comprehensive business valuation, contact Frank Storniolo, LGA Principal, CPA, CVA, MST at [FStorniolo@lgallp.com](mailto:FStorniolo@lgallp.com), or by calling Frank directly at 781-569-4750.



## About Frank Storniolo

Frank joined LGA as a Principal in 2015 to lead the firm's growing valuation practice. Since achieving his CVA credential in 2010, he has performed valuations for companies and business owners for a variety of purposes. Frank also specializes in tax and consulting services and often advises his clients beyond the valuation need.

## About LGA

LGA (formerly Litman Gerson Associates, LLP) is a CPA firm headquartered in Woburn, MA. Every day, we strive to achieve our mission to *Bring financial focus to your business*. We do this by developing deep relationships with our clients that enable us to provide strategic insight, straightforward advice and value added services, including business consulting and valuations, outsourced accounting services, tax planning, and assurance. LGA's leadership focuses on transparency, integrity, and communication leading to the dedication of our team of professionals and the high level of service they provide to clients. Is it working? LGA has risen in the BBJ Rankings from #46 in 2013 to #29 in 2018 without any significant acquisitions.