

# BaldwinClarke

— Planning has its rewards. —

## BUSINESS VALUATIONS

Our [business valuation services](#) are designed to meet a wide range of strategic, and formal planning needs for clients and advisors. Our appraisal services have been trusted to provide defensible documentation for estate, gifting, and compensation initiatives in addition to being employed to provide strategic insight and direction for private, family-run businesses and entrepreneurs.

Our process, which incorporates practical experience, thorough industry research, and empirical data, is further complemented by our perspective as investment bankers and capital market participants. Our professional staff has experience evaluating entities with revenues ranging from less than \$1 million to above \$200 million and has worked across a wide range of industries.

BaldwinClarke professional credentials include ASA, CVA, and CM&AA designations.

### What We Do

- Evaluate and value majority and minority interests in operating companies, as well as real estate and asset holding companies.
- Formal credentialed appraisals for IRS reporting purposes, with application to:
  - Estate and gift planning
  - Stock transfers
  - Shareholder buyouts
  - Buy-sell planning
  - Incentive equity stock option plans
- Valuation analysis, designed to support:
  - Sale and business combinations
  - Strategic and management planning
  - Succession and shareholder planning

Industries served include business services, consumer retail, distribution, healthcare, manufacturing, industrials, real estate holding companies, software, and transportation & logistics, among others.