

# Gift & Estate Tax Valuations



We have performed thousands of in-depth valuations for businesses in a variety of industries and sizes. This deep experience helps us dial-in on the factors that are critical to you and your businesses in relation to the wealth preservation of you and your family.

Our gift and estate tax valuation services assist high net-worth individuals and business owners in preserving their wealth. By working together with other professionals such as attorneys, accountants, private bankers, and financial planners involved in asset management for the individuals and families, we play an integral role in producing an effective estate and gifting strategy for asset management and wealth preservation.

## Experience & Tenure

- Performed 3,000+ valuations for various business structures (family limited partnerships, limited liability companies, partial ownership interest in assets such as real estate property, S and C Corporations, and sole proprietorships).
- 150+ years combined valuation experience, including at every Big Four firm
- A team of various certified professionals including CPAs, ASAs, and CFAs
- Consistent management team since founding in 2007
- Our gift and estate valuations have been used in:
  - Gift and estate tax planning & tax return filing;
  - Buy-sell and cross-purchase agreements;
  - Key person insurance funding;
  - Recapitalization; and
  - Charitable gift transaction and GRATs

## Access & Flexibility

- Full-service boutique gives clients easy access to partners and directors
- Cutting-edge, proprietary financial models
- Reasonable and competitive prices without cutting corners

## Rigorous Analysis

We ensure your valuation is properly performed based on your financial performance supported by our extensive experience in reviewing partnership or operating agreements and determining discounts for lack of control and marketability.

### Professionals

Kris Day, CPA

Partner

206-660-1295

Hong Yoo, ASA FRM

Director

415-794-9322

email below

### Clients

