

Business Valuation

The Succession Consulting Group is a service offered by Mutual of Omaha. It provides training and support that can assist insurance producers, advisors and their business-owner clients in their efforts to begin formulating a business succession plan.

Here's how they can help

- ❖ Providing materials that can help motivate and engage your clients
- ❖ Reviewing your fully-completed Succession Consulting Group Factfinder
- ❖ Working with you and your marketer to develop a preliminary report with their observations, based on the information from the Business Succession Planning Factfinder
- ❖ Participating in conference calls with you and your client's other advisors (if desired)
- ❖ Presenting an analysis with explanatory material (regarding planning ideas, types of agreements, concepts, etc.) that are specific to your client's plan
- ❖ Helping you provide undeniable value to your client and your client's entire exit-planning



Business Valuation can be used to:

Properly value the business

Perform calculations for five different valuation methods accepted by the IRS. Present the results with a complete and professional printed summary presentation.

Explore various owner needs

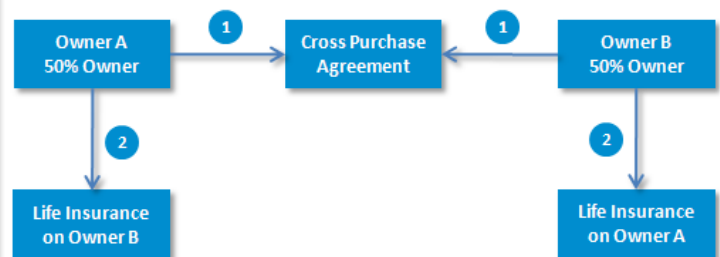
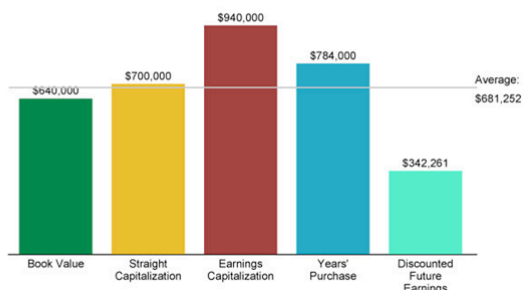
Explore solutions based on the relationship between the owner, the form of business, and the owner's continuation preferences.

Explore different funding needs

Consider potential solutions and determine the funding requirement for the solution amount.

Business Valuation

Valuation Graph



The brokerage company you do
business with makes a difference.