

Top 10 Reasons for Business Valuation

- 1 Better understand **Your Business** and its potential
- 2 Know the value of your largest asset so you can plan for **Retirement**
- 3 Ensure the business and your family are **Properly Protected**
- 4 Create a **Succession Plan**
- 5 Pay the right amount when you **Buy** a business
- 6 Get what it is worth at **Sale**
- 7 Create **Buy/Sell Agreements** with business partners
- 8 Explore **Funding Opportunities**
- 9 Establish a Trust or create an **Estate Plan**
- 10 Prepare for **Taxable Events** such as gifting or grants

Knowing the true value of your business is critical to proper business planning and achieving personal goals. Through our valuation process, we can help answer the questions that will lead you to make informed decisions for your future.

... Let us show you how.



OAKTREE
PREMIUM FINANCE

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An Innovative Approach to Business Valuations

We've invested in technology to help ensure our business owner clients have the facts needed to make sound planning decisions. Our innovative technology harnesses the power of big data to deliver accurate and efficient business valuations. The tool is easy to use, but backed by a sophisticated engine that has been trusted by millions of business owners worldwide.

We've incorporated the most **stringent security measures** to ensure privacy of data.

2

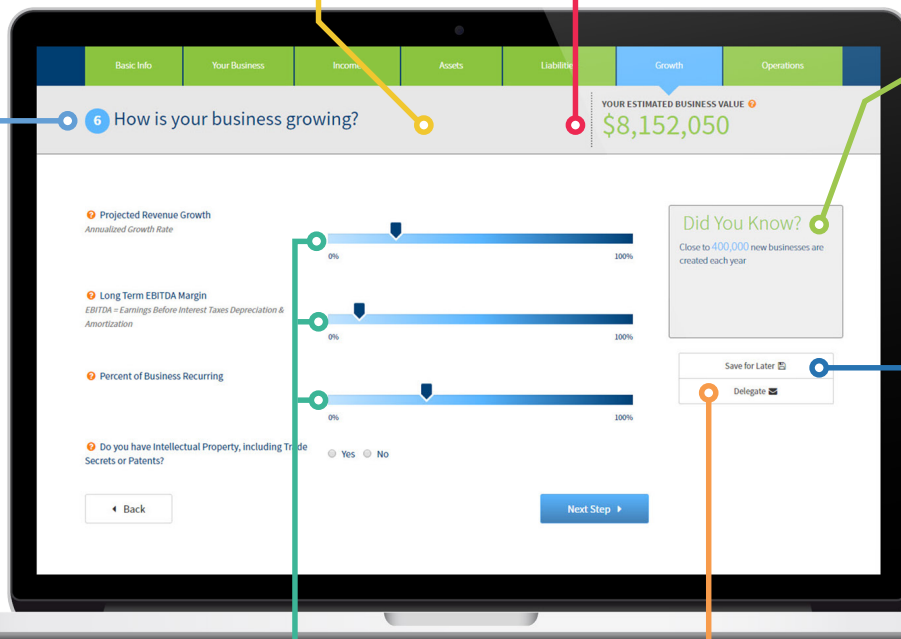
3

Watch your progress live. Our valuation tracker changes as you enter data.

1

7-Step Process

generates a comprehensive business valuation in a fraction of the time compared to traditional methods.



4

Learn how **your company compares to others.** The "Did You Know" feature provides helpful benchmarking data.

5

You don't have to complete the exercise in one sitting. **Save your progress and come back later.**

Dynamic sliders demonstrate how business changes affect your business value.

7

6

You can send a link to your CPA, Accountant or Business Manager with a request to complete the data.



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