VALUATION SERVICES

Working Together with Estate Planners & Attorneys



CBIZ Valuation Group works closely with estate planners and attorneys across the country to help value complex assets including both financial assets (closely held businesses, complex securities, investments, intangible assets, etc.) and tangible assets (real estate, commercial buildings, machinery and equipment), providing advisors with a single source for expertise and service.

This information is often critical to help minimize the impact of taxes, facilitate the transfer of assets and to ensure their clients preserve asset value for their heirs and beneficiaries.

Our national team also assists with M&A transactions, financial reporting, tax restructuring, fair market value opinions and other estate planning needs.

Your Client's Challenge *THE CBIZ SOLUTION*

ASSETS/INTERESTS HELD BY AN ESTATE
Business, intellectual property, property & equipment and real estate valuation to complete Form 706

GIFTS/TRANSFERS OF INTERESTS IN CLOSELY HELD COMPANIES
Well-executed, high-quality, defensible valuations that are compliant with applicable IRS standards

GIFTS/TRANSFERS OF INTERESTS IN FAMILY LIMITED PARTNERSHIP OR OTHER ASSET HOLDING ENTITIES
Valuation discounts for lack of control, lack of marketability and built-in gain

GIFTS/TRANSFERS OF LARGE BLOCKS OF PUBLIC STOCK
Quality valuation of blockage discounts that stand up to IRS scrutiny

GIFTS/TRANSFER OF RESTRICTED STOCK
Valuation that considers relevant market studies and applicable quantitative methods in assessing discounts

SECURITIES, STOCK OPTIONS, WARRANTS
Valuation of complex securities and other financial instruments based on sophisticated quantitative models and analytics

REGULATORY ISSUES AND IRS SCRUTINY
Tax valuation to help respond to regulatory developments, revenue rulings and tax court cases

CBIZ is a consulting, tax and financial services provider that works closely with CBIZ CPAs P.C., an independent CPA firm that provides audit, review and other attest services. In certain jurisdictions, CBIZ CPAs P.C. operates under its previous name, Mayer Hoffman McCann P.C.

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