



business valuation





objective appraisals to accurately determine value

Divorce. Gift and estate planning. Litigation. Buy/sell agreements. There are many reasons you may need an independent business valuation—and Cotton + Allen is the objective resource you need to perform it.

Determining the value of a privately held business is not always easy. At Cotton + Allen, we employ a comprehensive approach to valuing business interests, using in-depth analysis, relevant market data and state-of-the-art valuation techniques. Attorneys know they can trust our firm to produce accurate, defensible business valuation reports.

what you need, when you need it

Business valuations serve many needs. For estate planning purposes, a properly

prepared valuation can help avoid IRS challenges, undervaluation penalties and disputes among heirs. Other tax transactions may require the documentation of the fair market value of a privately held business as of a specific date. In business acquisitions, sales or mergers, a valuation helps to set realistic price expectations. A business valuation is also crucial to quantifying damages or settlement options in litigation.

Of course each situation is unique, and we work in partnership with our clients to determine the level of service you require, from a limited calculation of value to a comprehensive appraisal report. And if litigation is involved, we can also serve as expert witnesses to deliver valuation-related testimony in court.

**no one knows your business like
business valuation advice y**

broad experience and resources

At Cotton + Allen, our years of experience with privately held businesses, combined with our specialized valuation education, give us particular expertise in this arena. And as a member of the RSM McGladrey Network, we give you access to the business valuation resources of a national organization of more than 6,700 professionals in more than 300 locations.

innovation. dedication. experience. the legacy continues

Cotton + Allen is a full-service accounting and advisory firm serving the region since 1921. As trusted advisors to our clients, our talents extend beyond traditional tax and accounting work to include a broad range of disciplines that address business and financial needs today and in the future.



*Awarded honors for
outstanding historic
preservation,
our business home
in downtown Louisville's
First Trust Centre
is a testament
to our firm's legacy.*

**you do. but with cotton + allen as your trusted advisors, you can count on getting the expert
you need to reduce your tax burden and preserve what you've worked so hard to build.**

the right services

Cotton + Allen is a full-service accounting and advisory firm. We provide a range of services to meet your needs now and in the future:

audits, reviews + compilations

bookkeeping

budgeting + forecasting

business acquisition + disposition

business advice + planning

business valuation

employee benefit plans

estate + gift tax planning

financial planning + wealth management

information technology consulting

litigation support

outsourcing in accounting + tax

retirement plan design + administration

succession planning

tax planning + strategies

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a member of the rsm mcgladrey network

