

SYLLABUS

VALUATION SKILLS FOR FINANCIAL PROFESSIONALS

Course Overview

How can Financial Professionals talk to Business Owners about the importance of Business Valuation and how it helps Business Owners make better planning decisions?

In response to the Coronavirus impact to all small businesses this course has been created for Financial Professionals. Knowing the value of a company is one of the most important things a business owner can know because it evaluates the ability of a business to generate future cash flow and income. All financial and protection planning for a business must start with a valuation of the company.

The course is not meant to be exhaustive in nature. In most instances a Financial Professional will have enough information to help a business owner understand the importance of valuation and how it can be used in the planning process.

In this critical time Marshall+Viliesis is offering this course and all of the materials at no cost to Financial Professionals. We are all in this together. Forward Together.

Learning Objectives and Outcomes

- Understanding Valuation Fundamentals.
- Philosophy
- Traditional Valuation
- Online Valuation
- Rule of Thumb Valuation
- Opportunities from Valuation
- Goal Setting with Valuation
- Value and Protect

Core Values

We believe in the importance of Small Business to the economy of the United States and the rest of the world. In a time of crisis the Small Business Owner needs our best guidance, help and support. The business is the owner's most significant asset and now most vulnerable. Business Owners deserve a protection planning process that starts with valuation and they deserve Financial Professionals willing to partner with others to form a team to bring the best of the best.

Course Materials

The course will be delivered in video format with all lessons in 3 to 5 minute segments. A PDF summary and worksheet is also included. At this time a minimum of 5 lessons are planned. Additional lessons will be added as the course evolves.

"What's Your Business Worth?" - Michael Carter - Not required but helpful. Available on Amazon.

Doug Marshall - Instructor

Doug is a Certified Business Valuation Specialist and a partner of Marshall+Viliesis.