

Comparison Chart: Valuation vs. Calculation

Table 1 reflects the extent of the analysis required for a full valuation that is not required for Calculation of Value.

TABLE 1		
Opinion of Value vs. Calculation of Value		
Attributes	Opinion of Value	Calculation of Value
Analysis of:		
Historical & Prospective Financial Reports	X	X
Company Nature, Background & History	X	
Management	X	
Products and Services	X	
Owner Compensation	X	
Industry Research	X	
Facilities	X	
Competition	X	
Key Customers & Suppliers	X	
Organization Structure	X	
Future Plans	X	
Economic Reseach	X	
Financial Benchmark	X	
Market Research	X	
Risk	X	
Specific Company Risk	X	
Three Approaches to Value	X	
Minority & Marketability Discounts	X	X
Written Report	X	X
Accepted by the Courts	X	
Accepted by the IRS	X	
Basis for Expert Testimony	X	

To learn more please call me at [520-954-6197](tel:520-954-6197). We'll set up a no-cost introductory consultation so we can begin getting acquainted.

Ike Braden is a licensed CPA in both Arizona and Montana with 15 years of public accounting experience. He provides tax services (preparation, planning and consulting) for individuals and business, financial statement preparation, business valuation, litigation support and forensic accounting.