



Course Summary:

What's a business worth? Amazingly, at least 75% of the world's 200 million small businesses don't know what they're worth. Still, possessing an understanding of one's business value is perhaps the key ingredient when aiming to undertake a host of strategic activities and decisions. Business Valuation for Financial Advisors will prepare you to understand, apply, and utilize the principles, approaches, methods, and tools of business valuation associated with different types of business valuation reports and their content in order to optimally serve your clients as a "Certified Business Valuation Specialist".

By learning the fundamentals of business evaluation and valuation and applying this knowledge to valuing hypothetical companies, Financial Advisors of all backgrounds will enjoy heightened confidence and the ability to undertake truly meaningful discussions on topics which involve what is typically the single largest asset in any entrepreneur's investment portfolio - their business.

On your learning path, instructors Michael Carter (founder of BizEquity) and Scott Gabehart (Chief Valuation Officer for BizEquity and CBA, CVA, BCA) lead you through a grounding in the fundamentals of financial, accounting, operational, and industry/economic analysis as a prelude to an overview of the business valuation process used by professional appraisers. This will include an introduction to classical business valuation approaches, their related methods and data sources, along with an explanation of the practical yet proprietary "ARM Approach to Private Firm Valuation" and its differences and similarities to the classical approaches.

Your journey includes hands on practice where you apply the approaches, methods, and tools you have learned to analyze real life business challenges. In the final stage of this experience, the Valuation Capstone Project, you apply the ARM Approach, its related methods and data sources, and the various valuation and evaluation tools presented throughout the course to analyze and value a company in both traditional ways and via the patented online business valuation engine known as BizEquity.

Importantly, the experience will include a discussion of how to interpret and utilize the business valuation estimates and key performance indicators within the context of client engagement and service. Your knowledge of business fundamentals and the business valuation process will elevate your professional status and provide benefits to your clientele that others will not be able to replicate.