BIZ | EQUITY

Case Study

3 insurance proposals totalling over $200,000

"When I share a BizEquity valuation report, my clients say things like 'this is fantastic ... spot on!"

- Evan Walker

Explaining the Value of BizEquity

Evan doesn't pitch BizEquity, per se, but instead talks about the value of data, and the tremendous sense of relief and pride his business owner clients get when they know for certain what their business is worth.

Director of Insurance Services NBT Bank

Biz Equity Advisor Office User since 2015

Evan leads the sale of insurance products offered through our team of financial consultants and Trust Division professionals based at NBT Bank branches in NY, VT, MA, NH, ME and PA. Based in NBT Financial Group's Norwich offices, Evan selects and manages insurance products, develops insurance sales programs and provides product training.

BIZ | EQUITY

Case Study

90% conversation rate with BizEquity business valuation.

Andy Brincefield

President and CEO
Consolidated Planning, Inc.

BizEquity Advisor Office User since 2015

Andy Brincefield joined Consolidated Planning in 2005, after several years of leadership success in the financial leadership and technology industries.

Consolidated Planning has provided comprehensive planning services for over 25 years.

“By addressing the value of clients’ most important asset, I provide a service few others can provide.

- Andy Brincefield

The right time for a business valuation.

Andy uses BizEquity to engage clients who need help with exit planning, retirement income planning and estate/legacy planning. BizEquity’s Valuation Report is easy to understand and present, so Andy does not have to bring in a valuation consultant for additional insights.

BIZ|EQUITY

Case Study

Closes at least 30% of the clients engaged with BizEquity.

Joseph P. Mallee

Chief Executive Officer
Peerless Business Advisors

Biz Equity Advisor Office User since 2015

“In just three months, I made enough on commission to pay for my BizEquity subscription for the next two years.”

- Joseph P.Mallee

An engine for client referrals.

Since he started offering business valuations, Joseph has enjoyed an increase in referrals by his business owner clients. He has also collaborated with a local business associations to offer business valuations to quality prospects.

Joseph Mallee has been in the financial industry since 2000. Previously working for Guardian Life Insurance Company, IPG and Penn Mutual, Joseph became CEO of MassMutual Eastern Pennsylvania in 2011. In 2012 he co-founded Peerless Business Advisors to cater to the tremendous need for comprehensive business planning in the Lehigh Valley region of Pennsylvania.

BIZ | EQUITY

Case Study

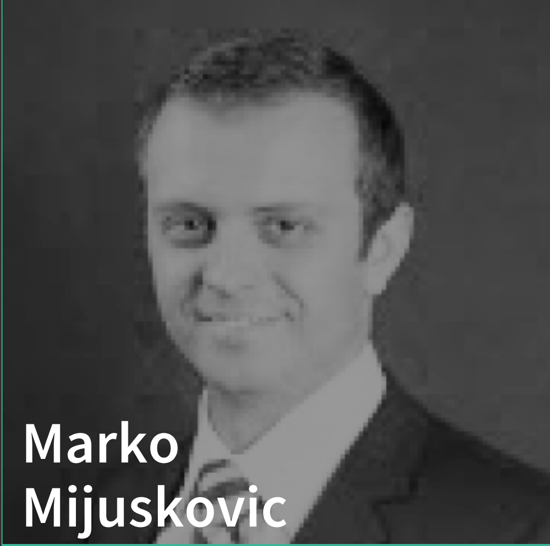
Charges a $2,500 fee to include a BizEquity valuation in planning process.

"I use BizEquity to convert business owner prospects into business owner clients."

- Marko Mijuskovic

Appealing to a common concern.

At a conference for dental professionals, Marko emphasized the pivotal role business valuations play in both business and personal planning. He left the conference with 25 qualified leads.



Marko Mijuskovic

Senior Partner
Wealth Strategy Partners, LLC

Biz Equity Advisor Office User since 2015

Marco Mijuskovic has been providing individuals and business owners with comprehensive financial planning services for over a decade. Marko is also the only financial advisor in the state of Hawaii to earn the Preeminent Designation for Certified Business Exit Planning. He has built Wealth Strategy Partners into one of the fastest growing financial firms in the region with offices serving three states.

BIZ | EQUITY

Case Study

Uses BizEquity to help large law firms value their partnership shares.

“BizEquity is the best tool to come along in ages because it helps clients solve real-life problems.”

- Myles Vincent Mezzetti

Engine for growth.

Miles has made BizEquity the mainstay of his marketing efforts and is excited by the many applications for the tool to drive growth in his practice.

Myles Vincent Mezzetti

Founder and President
Myles Wealth Management

Biz Equity Advisor Office User since 2016

Vince is committed to helping families, businesses, and not-for-profits grow and prosper using a creative approach to financial services that combines an innovative planning process with his personal experience in financial services, as well as the wisdom and empathy to build deep relationships with his clients.Vince presently offers insurance products through Security Mutual Life Insurance Co. of NY, where he is a President’s Cabinet Member.

BIZ | EQUITY

Case Study

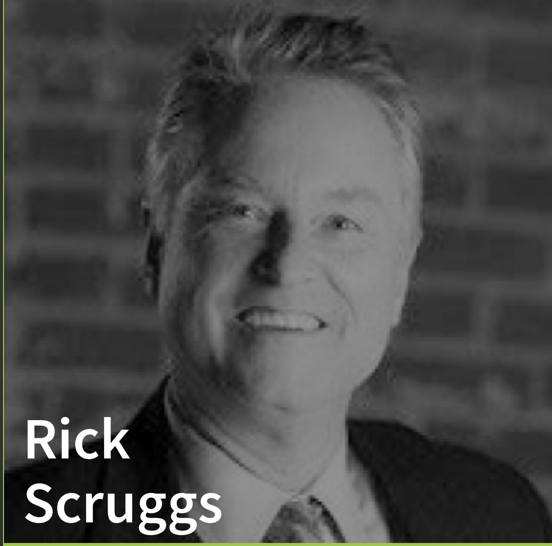
7 qualified leads and 2 new $15,000 policies after valuations seminar.

"BizEquity opens the door to new conversations and engagements with business owners."

- Rick Scruggs

A New Conversation

Rick believes in the power of education. Until he was introduced to BizEquity, however, he had difficulty attracting attendees. When he hosted a business valuation seminar, he was able to attract 25 prospects, get qualified leads and convert those leads into clients.



Rick Scruggs

Principal
Financial Designs

Biz Equity Advisor Office User since 2016

Rick Scruggs has worked with business owners and personal clients in Central Virginia and the Southeast since 1977. Rick is the principal of Financial Designs and the creator of the Vision Advocate Experience.

BIZ|EQUITY

Case Study

Increased AUM by $8 Million.

H. Adam Holt

Principal
Rubin Goldman
and Associates

Biz Equity Advisor Office User since 2016

A prospect was negotiating the sale of his business when Adam offered to provide a valuation. The BizEquity valuation substantiated a much higher value than was being offered, which led the owner to decline the low-ball bid, and sign on with Adam.

Gaining Trust. Gaining Assets.

The added level of service provided by offering a business valuation led the business owner to trust Adam and his firm with $8 million dollars of his personal assets.

Adam Holt's career began in 1998 when he joined Karr Barth Associates as an insurance and investment professional. He built a practice using a consultative approach, educating clients and communicating specific, well thought-out plans to help them meet their needs. Adam joined RubinGoldman and Associates in 2000, to build the firm's investment team.