

ADVANCED MARKETS

Partner with North American for a business valuation

For business life insurance cases, a company valuation is sometimes necessary for financial underwriting to determine insurance needs and the client's capacity to maintain the policy. However, valuations can be costly and time-intensive. When the security of your client's livelihood is on the line, it's important to make this process as smooth and expedited as possible. A Calculation of Value helps position you as a trusted resource to your business owner clients and helps them determine the next step towards financial independence.



Our Partnership

North American has partnered with **Marshall & Stevens, Inc.**, a leading provider of valuation services for business entities, to provide your client with a **complimentary** Calculation of Value that can be used for planning and underwriting purposes.

How it Works

Businesses with a revenue of \$3 million or more may be eligible to receive an independent Calculation of Value, based on the IRS Fair Market Value standard. To get started, email advcasesdesign@sfgmembers.com to receive a copy of the Business Planning Questionnaire.

Please note: while not a full formal valuation, this process provides a range of value for the business.

About Marshall & Stevens

Marshall & Stevens has a 90-year history working with some of the most recognizable businesses and organizations in the world, from those on the Fortune 100 list to locally owned companies. With nearly 200 employees located in major cities throughout the United States, their team has experience with businesses in a multitude of industries, sizes, geographic locations, and structures. Their third-party valuations provide a range of value to help business owners make informed decisions for themselves and their futures.



Businesses in the marijuana industry or specializing in art and collectibles are not eligible for this service.

Marshall & Stevens is a third-party company and is not affiliated with North American.

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