

**ADVANCED  
MARKETS**

# How to request a Marshall & Stevens business valuation

marshall

stevens

Valuation Excellence since 1932

Follow these six steps to receive a business valuation before designing a life insurance solution for your business owner client.

1

Email [advcasedesign@sfgmembers.com](mailto:advcasedesign@sfgmembers.com) to see if your client's business is eligible for a free Calculation of Value. Eligible businesses must have \$3 million or more in revenue.

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

2

Work with your client to fill out and sign the Business Planning Questionnaire.

3

Submit the Business Planning Questionnaire back to [dholm@sfgmembers.com](mailto:dholm@sfgmembers.com) at North American along with three years of Financial Statements (Balance Sheet and Income Statements). Tax returns are not accepted.

4

A draft Calculation of Value will be available to review within 10 – 15 business days.

5

Marshall & Stevens will share the results with you, the financial professional. After, a representative from Marshall & Stevens will be available to present, discuss results, and answers questions for both you and your client. At that time, a final Calculation of Value will be completed.

### Submit the life insurance application

6

If an application has not yet been submitted, upload the completed Calculation of Value to the application.

If an application has already been submitted, use the Secure Document Upload feature on the website to add to the case file.

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