



“Current valuation levels can increase wealth transfers”

Cambridge Partners - valuation services:

- Valuations of FLPs and LLCs for Estate & Gift
- Business & Equity interest valuations
- Real Estate appraisal
- Litigation support valuations
- ESOP valuations
- Fairness & Solvency Opinions
- Valuations for financial and tax reporting
- Options valuations (IRC 409A)
- Machinery & Fixed Asset Appraisals
- Real Estate Cost Segregation Analysis

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The role of Valuation analysis in an economic slowdown for Gifting

Calendar Year 2016

The current and future outlook of the national economy in many ways affects the values of real estate and businesses. With our current embattled economy impacted by inflation, interest rates and low consumer confidence, depressed market values for many investments and real estate holdings are evident.

It is now more important than ever to recommend that your clients re-examine their gift and estate planning strategies. Suggesting that assets, FLPs, LLCs, or businesses be re-evaluated at this time may create significant benefits through lower valuation multiples and higher percentages of wealth transfer....a key to effective estate planning.

We are very experienced within this area and are prepared to provide an initial evaluation to determine if your client may benefit. If so, we will be prepared to provide a fully documented valuation or discount study to support any gifting or wealth transfer strategies.

About Cambridge Partners & Associates:

Cambridge Partners is a management consulting firm specializing in valuation services including: business and stock valuations, real estate appraisals, intangible asset and intellectual property valuations, market studies, machinery and equipment appraisals and cost segregation studies. Many of our professionals have backgrounds and experience from Big 4 accounting firms, national consulting firms and institutional investors. Our techniques and methodologies are original, well documented, and are designed to withstand the scrutiny of the most discerning authorities.