

Business Valuation Solutions

At Sorren, we believe a strong valuation isn't just a document; it's a foundation for smarter business decisions, seamless transactions, and effective planning.

Reliable valuations are essential for fair transactions and strategic growth. We take the time to understand your company's distinct needs, analyzing both financial performance and market conditions to deliver insights that matter to your specific situation. Whether you're preparing for a purchase or sale, seeking investment, managing equity compensation, or planning for succession, our Valuation Services provide the clarity you need to confidently make the hard decisions.

Our valuation reports are meticulously documented to withstand scrutiny from regulatory authorities, ensuring your peace of mind. By collaborating closely with our clients, we uncover the truth behind the numbers to deliver independent, objective perspectives that drive confident decisions and increase value.

BUSINESS VALUATION SOLUTIONS

Estate, Trust & Gift

- Defensible valuations for estate, trust, and gift tax planning—supporting compliance, strategic wealth transfer, and long-term goals.

Financial Reporting

- Reliable reporting that provides clarity, supports compliance, and instills trust in strategic decision-making.

Option Pricing Models

- Precise option pricing models that deliver clear, accurate insights for managing equity compensation and award strategies.

Transition Planning

- Valuation guidance for strategic ownership transitions to internal team members or external investors, ensuring long-term business success.

Portfolio Valuations

- Comprehensive portfolio valuations to help assess and optimize the value of investments and holdings.

ESOP Valuations

- Accurate assessments for employee stock ownership plans, helping companies navigate ownership transitions.

Personal Goodwill Valuations

- Identification of the separate components of intangible value tied to personal goodwill through analyzing the owner's reputation, skill, and business relationships.

WE ASSIST WITH:

- Affiliate & Insider Transactions
- Corporate Reorganizations
- Down-Round Financings
- Mergers & Acquisitions
- Redemption of Shareholder Interests

Our credentialed business valuation specialists bring clarity to the complexities of valuation while adhering to strict development and reporting standards. We render an independent, objective opinion of your company's value, in a reporting format tailored to meet your needs.