



## Engage business owners with a complimentary business valuation

### Your sales opportunity

#### Business owners who:

- Wish to know an approximate value of their business
- May be postponing decisions because they lack this knowledge
- Don't want to spend time and money on a certified appraisal

### Your solution: Offer a business valuation

In many cases, a business owner's most valuable asset is their business. Knowing the value of that asset is critical to proper business planning and achieving personal financial goals. By harnessing the power of data and the latest technology, we can quickly deliver an efficient business valuation. So you can help clients move their plans forward.

### Four valuable features

1. Informal valuation providing a general estimate of fair market value to help with business succession, estate planning and retirement analysis needs
2. Easy-to-use process
3. Receive valuation reports in days, not weeks, once all pertinent information is obtained
4. Valuation service is complimentary and with no obligation.



### Learn more

Call our Advanced Sales  
Team at  
**1-888-413-7860, option 3**

---

## Target client

### Business owners who are:

- Implementing or updating buy-sell arrangements
- Building strategies for eventual exit from the business and transition of ownership
- Developing strategies for retirement
- Writing their estate plan

## How it works

### Step 1: Initial case consultation

Call or email our Advanced Sales Team at: 1-888-413-7860, option 3, [advancedsales@securian.com](mailto:advancedsales@securian.com) to discuss our valuation process.

### Step 2: Data gathering

Complete the required fact finder and gather three years of company tax returns and financial statements (balance sheets and profit and loss statements with a December 31 year end).

Email the fact finder and financial data, with the name of the company in the subject line to [advancedsales@securian.com](mailto:advancedsales@securian.com).

**Be sure to enter the business name in the subject line.** Timely completion relies on providing all necessary financial information.

### Step 3: Valuation report and review

Once the data has been entered, we will contact you to schedule a follow-up call to review the report and discuss sales opportunities.

---

## Business valuations can help with:

- Placing buy-sell cases
  - Meeting estate planning analysis needs
  - Implementing important financial or business strategies that might otherwise be delayed
- 

The estimated valuation provided by Securian Financial is not to be relied upon for purposes of the sale of Client's business, calculating estate or gift tax obligations, calculating income tax obligations and other taxes or any other purpose requiring a precise or definitive valuation. It is not to be used to establish a value that is intended to be legally exact and/or have a binding legal effect or to determine adequate (as opposed to minimum) levels of life or business insurance coverage.

This material may contain a general analysis of federal tax issues. It is not intended for, nor can it be used by any taxpayer for the purpose of avoiding federal tax penalties. This information is provided to support the promotion or marketing of ideas that may benefit a taxpayer. Taxpayers should seek the advice of their own tax and legal advisors regarding any tax and legal issues applicable to their specific circumstances.

These materials are for informational and educational purposes only and are not designed, or intended, to be applicable to any person's individual circumstances. It should not be considered investment advice, nor does it constitute a recommendation that anyone engage in (or refrain from) a particular course of action. Securian Financial Group, and its subsidiaries, have a financial interest in the sale of their products.

Insurance products are issued by Minnesota Life Insurance Company in all states except New York. In New York, products are issued by Securian Life Insurance Company, a New York authorized insurer. Minnesota Life is not an authorized New York insurer and does not do insurance business in New York. Both companies are headquartered in St. Paul, MN. Product availability and features may vary by state. Each insurer is solely responsible for the financial obligations under the policies or contracts it issues.

Securian Financial is the marketing name for Securian Financial Group, Inc., and its subsidiaries. Minnesota Life Insurance Company and Securian Life Insurance Company are subsidiaries of Securian Financial Group, Inc.

**For financial professional use only. Not for use with the public.** This material may not be reproduced in any way where it would be accessible to the general public.



INSURANCE  
INVESTMENTS  
RETIREMENT

[securian.com](http://securian.com)

400 Robert Street North, St. Paul, MN 55101-2098  
©2022 Securian Financial Group, Inc. All rights reserved.

F79529-1 Rev 10-2022 DOFU 10-2022  
2455425