

Business Profile

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 appraiser

Solution: 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 big data and the latest technology, we can quickly deliver an efficient business valuation, providing you with the information needed to move your client's plans forward.

Four valuable features

1. Informal valuation to help with business succession, estate planning, and retirement analysis needs.
2. Easy to use questionnaire.
3. Receive valuation reports in a matter of days, not weeks.
4. Valuation service is a complimentary benefit of your relationship with Securian.

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

Call the Securian Advanced Sales Team at **888-413-7860, Option 3**

We'll want to discuss the business owner's objectives and how a valuation will help them achieve their goals.

Step 2

We will send you a link to a secure, online intake form. Use this form to input your client's financial information. We're looking for three years of tax returns, or, alternatively, three years of balance sheets and profit and loss statements.

Step 3

Once finished entering your client's information, we'll take it from there, and in a few days email a business valuation for your client.

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.

NEED MORE INFORMATION?

Call Securian's Advanced Sales Team at 888-413-7860, Option 3

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 affiliates, have a financial interest in the sale of their products.

Please note: Minnesota Life and Securian Life's estimated valuation shall not be used for any purpose with state and/or federal taxing or other authorities. 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. The estimated valuation 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

This information should not be considered as tax or legal advice. Clients should consult their tax or legal advisor regarding their own tax or legal situation. 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.

Securian Financial Group, Inc.
www.securian.com

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. 400 Robert Street North, St. Paul, MN 55101-2098
©2018 Securian Financial Group, Inc. All rights reserved.

F79529-1 Rev 1-2018 DOFU 1-2018
342535

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.