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Synergy SMB Offers Free Business Valuation to Help Small Business Owners Understand How the Value of Their Business can Fit into Their Financial Plan

Phoenix, Arizona — (11/07/2024) – Synergy SMB, a fiduciary financial advisory firm specializing in small business owners, is offering a free business valuation for small and medium-sized businesses. This initiative helps business owners understand the value of their business, as an asset class, so the revenue from the potential sale can be used as part of their financial plan.

“Many financial plans don’t take into account the value of the owner’s business,” says Synergy SMB’s Chief Investment Officer, Joe Maas. “Yet it is near impossible to create an accurate financial plan without it.”

A business valuation is also one of the easiest indicators of the effectiveness and health of your business. It is similar to a blood pressure test for your business. If your business is in the healthy range, you are fine. If not, it can tell you where you are weak, so you can address it early, while there is still time to maximize the value of one of your biggest assets.

Synergy SMB creates a market-based ballpark estimate, which provides a reasonable estimate of the value of your business along with a 40-page report that is easy for a business owner to understand. It uses eight market methods, includes industry comps of what actual businesses like yours have sold for, and includes the most probable selling price. It usually takes about an hour to complete and requires minimal accounting information.

“A valuation typically costs from \$500 to thousands of dollars. We are offering it as a free service as a no-obligation way to introduce ourselves as a new local business,” says Mr. Maas. “The valuable report is yours to keep, and it’s a great resource.”

You can request a free valuation at www.synergy-smb.com.

About Synergy SMB:

Synergy SMB is a fiduciary financial advisor specializing in small business owners. The

team has over 30 years of experience (navigating 3 recessions) and serves over 3,500 clients. Leadership is certified in financial analysis, valuation, mergers and acquisitions, financial and estate planning, etc. A sister company, Synergy Asset Management, developed the Strategically Aligned Asset Manager (SAAM™) model to help other financial advisors nationwide with asset, marketing, and practice management. The company headquarters was previously in Bellevue, WA, but has recently moved into the Phoenix, AZ area.

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