

Advising Buyers and Sellers of Small Businesses

Brief Description:

Understand how CFO's, CPA's, CVA's, lawyers, and other advisors can effectively work with clients who are preparing to buy or sell a business.

Focus will be given to helping the client assess underlying needs and desires so they are prepared for the emotional changes of this type of life change.

How to increase business value in preparation and an overview of the business sale process.

Learning Objectives:

- Identify issues and questions that lead to meaningful conversations
- Determine if owners are truly ready to sell – and when
- Set realistic expectations and prepare owners for typical sales cycle and uncertainty and
- Determine specific predictable factors that may increase profitability across products, services, or units of a company
- Understand and be able to oversee the steps for a proper brokerage / investment banking transaction
- Understand and complete comprehensive due diligence steps and procedures
- Rate financing alternatives including SBA, Private Equity, and conventional financing for different types and sizes of transactions.

Program Level: Basic to Intermediate

Presentation time: 50 / 60 minutes

All presentations will be customized for your participant's needs or requirements.

**Contact us (609-664-7955 or learning@TheArtofBusinessValuation.com)
to learn about other presentation topics – or to discuss your group's specific requirements.**

Presentations by Gregory Caruso, J.D., C.P.A., C.V.A.
Author, “The Art of Business Valuation, Accurately Valuing a Small Business”

Webinars, presentations, and courses by Greg Caruso are perfect for

- **Continuing Legal Education (CLE)**
- **CPA and Accounting Continuing Professional Education (CPE)**
- **Business Valuation (CVA, ABV, ASA) Continuing Professional Education**
- **And Many Other Groups**

All webinars and presentations are created and led by [Greg Caruso, JD, CPA, CVA](#) , author of “The Art of Business Valuation, Accurately Valuing a Small Business”.

- All virtual events are recorded for post-event viewing.
- Extensive professional materials are provided to attendees.
- Greg is available for questions by email or phone for a period of time after each presentation.
- For some presentations, Greg can facilitate small group discussions after the event.

By presenting in an interactive format and covering topics at varying technical levels, your participants are engaged and learn critical elements including relevant applications of the material. We are committed to providing an excellent program that exceeds your expectations.

About Greg:

Partial CV, Previous Presentations:

- “Business Valuations in the Shadow of COVID-19” - multiple including BVR, AAA CPA
- “Primer on SBA Business Valuation, What to Look For,” Maryland Commercial Lenders Assoc.
- “Market Method for Valuing Small Businesses,” NJ NACVA
- “Taxes for Small Business M&A” Virginia Association of CPA’s
- “Buying, Selling, Valuing Small Business: The Similarities and Differences”, Valuation Products and Services, Jim Hitchner
- “Exciting Exits”, Society of Financial Service Professionals, Maryland

Editor-In-Chief

- “Around the Valuation World” Webinar, NACVA, Editor, Moderator and Contributor, monthly since 2016

Author

- [The Art of Business Valuation, How to Value a Small Business](#), Wiley, Fall 2020
- [11 Secrets To Selling Your Business](#), Book, March, 2007, Authorhouse.

Business Valuation and Business Brokerage

- Harvest Business, LLC, Business valuations and business brokerage since 2004. Lead broker in over 60 transactions. 100’s of business valuations for all purposes.

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