

See Inside Your Client's Biggest *Asset*.

For a business owner, the company is the largest, most illiquid asset and the engine behind every personal goal — and to you it's a black box. We make it legible: what it can sustainably pay your client, what it's worth, and how durable it is — all traceable to source, monthly.

THE GAP

You can't properly plan around an asset you can't see, value, or project. Distributions are a guess, the business's value is a once-a-year estimate, and concentration risk goes unmanaged.

THE FIX

Clean monthly books that surface distributable owner cash flow, an indicative value range built on adjusted EBITDA (earnings before interest, taxes, depreciation, and amortization), and a durability read — defensible numbers you can build a plan on, and revisit every month instead of every spring.



↳ what the asset is worth, and what it can safely pay your client

Indicative, not a formal appraisal — but every input traces back to the source transaction.

WHAT YOU CAN FINALLY PLAN AROUND

- **Sustainable distributions** — what the business can reliably pay the owner.
- **An indicative value range** — the client's largest illiquid asset, finally legible.
- **Durability & concentration** — the risks to the plan, surfaced early.
- **Exit / succession readiness** — valuation-ready, trending financials before a sale.

Defensible, not a once-a-year guess. The value range and distribution figures walk back to source transactions in QuickBooks — solid enough to build a plan on, and refreshed monthly. It's an indicative range, not a formal appraisal, and we say so plainly.

You plan your client's future. We make their biggest asset legible.

A plan built on numbers you can see inside.

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Let's look inside a client's business →