


Cashing Out Study Group

Centers Of Influence



Presented by: Brad Davidson, President
SPAR DATA Value Advisors

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Curriculum

1. The question nobody's asking
2. Know what they've got
3. Responding to concerns
4. Grow what they've got
5. Know their exit options
6. Starting the conversation
7. Centers of influence

Who Are COIs?

1. CPA
2. Attorney
3. Financial advisor
4. Insurance agent
5. Banker
6. P&C agent


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Four Ways To Work Together

1. Use the *Diagnostic Tool*.
2. Host a *Client Event*.
3. Host a *Study Group*.
4. Host *CPE*.
5. Collaborate on valuation.

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1. The *Diagnostic Tool*



- You teach (or let us teach) how to use.
- Share cases.

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2. What Do COIs Fear?

Being seen as a commodity.

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2. The Client Event

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Educational Programs for Business Owners

Lectures

SPARDATA's president Brad Davidson is a popular speaker who is prepared to give interesting, non-technical lectures on these and other topics (click lecture titles to expand):

- + Three Things to Know to Successfully 'Cash Out' of Your Business
- + What to Your Business Worth (And Why You Need To Know)

Related Resources: [Seminar Proposal Letter](#) | [Sample Invitation](#) | [Feedback Form](#)

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Your Closing Remarks

1. Business owners should:
 - know what they've got;
 - grown what they've got; and
 - know their 6 exit options.
2. I can help you 'cash out'.
3. I can also help with ...

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3. How To Build Relationships with COIs

Solution:
Collaborate together for an hour a week, for seven weeks.

3. Host A Study Group

Workshop/Study Group

SPARDATA offers seven hours of practical training for advisors seeking greater success working with small business owners. The presenter is SPARDATA's president Brad Davidson (link to CV), a nationally-known speaker. The instruction can be delivered as an all-day workshop, a webinar-based study group that meets for an hour once a week (for example, Tuesdays from 8:30am-9:30am) for seven weeks, or a combination of the two. Here is the Workshop curriculum (click to expand).

- + Session 1. The Question Nobody's Asking
- + Session 2. Know What They've Got (Cashing Out Step 1)
- + Session 3. Responding to Concerns
- + Session 4. Grow What They've Got (Cashing Out Step 2)
- + Session 5. Know Their Exit Options (Cashing Out Step 3)
- + Session 6. How To Start The Conversation
- + Session 7. Centers Of Influence

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4. How To Build Relationships with CPAs

CPE and CE Programs


SPARDATA's president Brad Davidson is available to present a variety of continuing professional education (CPE) and continuing education (CE) programs. The organization hosting the event usually handles the CPE/CE paperwork or else for an additional fee of \$25 per attendee, SPARDATA will subcontract the task to the Maryland Association of CPAs Business Learning Institute.

1. The Statement on Standards for Valuation Services: What It Means, How To Comply (2 hours)
 This program is designed to familiarize participants with the AICPA's Statement on Standards for Valuation Services. It introduces the key features of SSVS-1 and explains step-by-step how to comply with it. This program is ideal for CPAs who prepare "informal" and/or formal valuations, and any CPA whose clients include business owners. Taught at host's location, it is ideal as a "lunch & learn" program. Attendees earn two Accounting and Auditing (AAA) credit hours. No prior valuation experience necessary.
2. Introduction to Business Valuation (6 hours)
 This course is introductory and is designed for the individual knowing nothing or very little about business valuation. It introduces the participant to business valuation concepts, theory and application. Topics covered include:


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CPA-specific considerations

SSVS



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