VALUESCOPE
a marshall + stevens company

Gift & Estate Tax Valuation Services

ValueScope's team of highly degreed and credentialed professionals have been relied on for decades by clients to navigate extensive estate planning transactions involving tangible and intangible assets, tiered and complex valuation interests and can defend their opinions under intense examination with well documented and supported analyses.

We tap into our extensive expertise to guide clients through the complexities of the tax regulations. The ValueScope approach and deep understanding of the regulatory landscape enables us to deliver tailored solutions that meet each client's unique needs. We routinely value closely held corporations, family limited partnerships (FLPs), LLCs, stock options and restricted stock. Fair market values are determined following the IRS's Revenue Ruling 59-60 as well as industry standards including USPAP and SSVS. The complexities of succession planning and estate reporting make accurate valuations challenging. Increased IRS scrutiny of estate and gift tax valuations means that errors can lead to severe consequences. Having an experienced and knowledgeable valuation advisor is crucial.

Our Gift & Estate Tax Valuation Services

- Valuation of Closely Held Business Interests
- Discount Studies
- Business Valuations

How Can ValueScope Assist in Gifting

Accurate Valuations

ValueScope provides precise and reliable valuations of business interests and other assets, ensuring compliance with IRS requirements and optimizing your gifting strategy.

Strategic Planning

With extensive experience in estate planning, ValueScope can help develop and implement a comprehensive gifting plan tailored to your needs and goals.

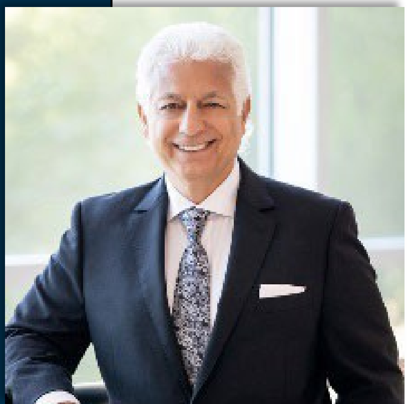
Minimizing Tax Liabilities

By accurately valuing assets and advising on the optimal timing and structure of gifts, ValueScope helps minimize potential gift and estate tax liabilities.

Expert Testimony

If needed, ValueScope can provide expert testimony and support in any disputes with the tax authorities, ensuring your interests are well-protected.

Meet Our Experts



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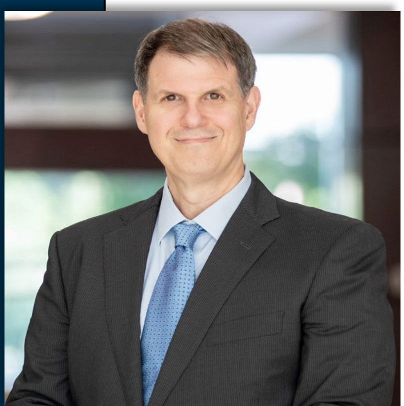
Areas of Focus:

- Gift and Estate Tax Valuation
- Transaction Advisory
- Financial Strategy, Value Optimization, Board Advisory



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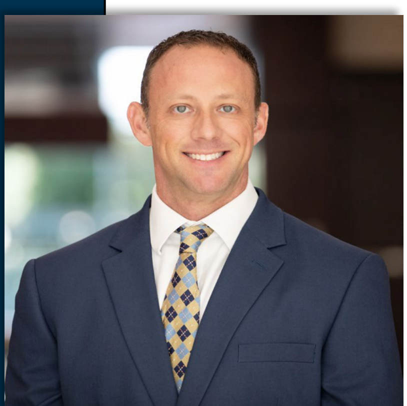
Areas of Focus:

- Gift & Estate Tax Valuation
- Valuation of Financial Institutions
- Valuation of Oil and Gas Related Entities and Interests



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Areas of Focus:

- Transaction and Board Advisory
- Mergers and Acquisitions
- Gift and Estate Tax Valuation