

VALUATION SERVICES FOR ESTATE PLANNING

At Adamy Valuation, we understand estate planning is about more than just numbers—it's about preserving wealth and ensuring a smooth transition of assets across generations. A business valuation is a key element of effective estate tax planning and can provide key insights for succession planning. With our experience and expertise, we provide independent, defensible valuations that provide peace of mind when navigating complex financial situations.

OUR SERVICES

- Valuation for gifting, trusts, and related-party transactions (form 709)
- Valuation of equity interests in FLPs and LLCs
- Studies of discounts for lack of control and lack of marketability
- Valuation for estate tax filings (form 706)
- Expert witness services on valuation in probate proceedings
- Valuation for charitable giving (form 8283)

Why a Valuation Matters

The value of a closely-held business often forms a substantial part of an estate, making an independent, defensible valuation essential to the estate planning process. A thorough business valuation sets the foundation for effective wealth transfer strategies, helping to establish realistic expectations, minimize tax liabilities, and ensure accurate estate and gift tax filings. This is particularly important when determining the appropriate 'step-up' in basis to fair market value for transferred assets, or when applying for the portability of the unused portion of the federal estate tax exemption, as both provisions can offer considerable tax savings if executed correctly.

Why Choose Adamy

Trusted Expertise in Complex Valuations

Leading estate planning attorneys and CPAs trust Adamy for our expertise, credibility, and commitment to delivering comprehensive, IRS-compliant business valuations. Our team includes credentialed professionals with deep experience in gift and estate tax valuations, providing an unmatched level of service and professionalism.

Family-Owned, Client-Focused

As a second-generation, family-owned business, we are uniquely positioned to understand the challenges business owners face when navigating the estate planning process. Having experienced the transition of ownership firsthand, we bring a deep empathy and personal insight to our work, ensuring that your succession plan is not only financially sound but also aligned with your long-term vision for preserving family wealth.

OTHER AREAS OF EXPERTISE

- Tax Reporting
- Divorce
- Dispute & Forensic Advisory
- ESOP
- Corporate Planning
- Transaction Opinions
- Equity Incentive Plans
- Financial Reporting



Visit our website to learn more and meet our team of experts!