Private Client Services

SUPPORTING AND REALIZING VALUE

SRR
STOUT | RISIUS | ROSS

Private Client Services

SRR provides advisory services to trust & estate attorneys, high-net worth individuals, family offices, trustees, tax accountants, and asset managers.

Typical engagements include:

- Business valuation
- Sale advisory and succession planning
- Discount studies (FLP/LLC)
- Tax controversy and expert testimony
- Real estate appraisal
- Forensic accounting
- Complex illiquid financial instrument valuation
- Fractional interest valuations
- Restricted stock and blockage discount opinions
- Preferred stock/interest valuations
- Valuation of private equity and hedge fund interests
- Buy-sell agreement consulting

Valuations Built to Withstand Scrutiny

In supporting value before the Internal Revenue Service, within litigation, or during consultations, our team of ASAs, CPAs, CFAs, CFEs, and MAIs provides fully documented valuation analyses and expert testimony for complex matters.

Advisory Services to Achieve Liquidity

In realizing value, our Investment Banking professionals evaluate liquidity and strategic alternatives for privately held companies. Our depth of experience in recapitalizations, management buyouts, employee stock ownership plans (ESOPs), and sales or mergers provides for the full range of liquidity alternatives. We are well versed in understanding the potential conflicts between corporate and shareholder objectives as well as the unique needs of family owners.

www.srr.com

SRR's multi-disciplinary composition, which includes investment bankers, valuation professionals (both business and real estate), and forensic accountants specialize in supporting and realizing value for our clients.

Investment Banking

Valuation & Financial Opinions

Dispute Advisory & Forensic Services

Private Client Services