

# THE STEPS

- Overview of tax returns & financial statements
- Interview with management
- Site visit
- Several year financial analysis
- Determination of income and adjustments
- Funds flow tracing and analyzing personal financial records
- Determination of reasonable compensation
- Obtaining and analyzing economic, industry, and related financial data
- Comparing subject company to its industry
- Determining the appropriate valuation approaches and methods
- Preparing a report
- Tax strategizing
- Assistance in the negotiation process
- Succession Planning

PLACE  
STAMP  
HERE



**TheHobbsGroup**  
CERTIFIED PUBLIC ACCOUNTANTS & CONSULTANTS, PA

## REAL-WORLD ANALYTICS

TO MAKE THE MOST OF YOUR SUCCESS

See how you compare to your industry peers  
in order to enhance your future business  
decisions.



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## WHAT WE DO

Now more than ever, it's vitally important to understand your current financial condition and how future decisions will affect your growth and profitability. We have invested in a method for analyzing your financial metrics in contrast to your industry peers utilizing real-time industry data from privately held companies. Using specific key performance indicators, we will work with you to make strategic, proactive decisions, which will directly affect your bottom line and lead to better business decisions moving forward.

## BENEFITS

We view our role in the valuation process as an opportunity to provide constructive solutions for maximizing profitability and efficiency.

### SIZE

We are large enough to offer specialized services, but small enough to develop close personal relations with our clients.

### EXPERIENCE

We have been involved in litigation support and provided valuation-type services for over 25 years.

### COST

You will find that our fees are very competitive with larger metro Areas in the Southeast including Charleston, Charlotte, and Atlanta.

## BUSINESS PERFORMANCE REVIEW

Our Business Performance Review is a comprehensive and dynamic narrative that takes a top down approach in analyzing up to 5 periods of company data. Your company data will be compared to real-time industry data in your target market. This tool is excellent for "benchmarking" and uses Key Performance Indicators (KPI's) to identify what factors are important to your specific industry.

Using raw data such as your income statement and balance sheet, we are able to evaluate your company's performance against an industry scorecard. This allows increased visibility into areas of your business that are performing above or below standards. Improvement can be made in all aspects, maximizing your potential.

## REPORT COMPONENTS

- Real-Time Industry Data
- Industry Growth Rates
- Industry Intelligence

## FINANCIAL FORECASTING

Forecasting and Financial Modeling is a powerful tool for the next steps in performing deeper financial analyses, shifting the focus from historical events to the present and future. The analysis is built from historical client data (3-5 years), which allows for/includes the following:

- Monthly, Quarterly and Annual Financial Statement Forecasts
- Cash Flow Statement Forecasts and Projections
- "What-If" Scenario Analysis
- Loan Analysis Tool
- (Informal) Valuation Tool
- Industry Comparisons
- Ratio Analysis
- Trend Analysis



## CONTACT US | The Hobbs Group, P.A.

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