



VALUATION ADVISORY

The Valuation Advisory Services team at Whitley Penn provides a wide range of compliance and consulting services regarding the valuation of businesses, partial ownership interests and specific intangible assets. We prepare valuations for a variety of purposes, including tax reporting, financial reporting, regulatory compliance, management consulting, succession planning and transactional advisory support.

Our team has extensive experience with the following situations:

- Business combinations (ASC 805)
- Impairment testing (ASC 350/360)
- Stock-based compensation/options (ASC 718/IRC 409a)
- Fair value reporting (ASC 820)
- Estate and gift tax valuation (Qualified Appraisals)
- Buy/sell agreement/ownership transactions-related consulting

Our credentialed valuation professionals combine the knowledge and analytical skills necessary for the quantitative side of valuation with the experience required for the qualitative side to provide independent valuation opinions our clients can trust.



How We Help

We help you understand what your business is worth and why it matters. Whether you're planning for growth, preparing for a sale, or navigating legal or financial decisions, our valuation experts provide clear, accurate insights you can trust. We tailor every solution to your goals and work closely with you every step of the way.



Your Future is Our Focus



What Sets Us Apart

Experienced Team

- Skilled professionals who know your industry and your needs.

Custom Solutions

- Valuations tailored to your business goals.

Quality Deliverables

- Analyses and reports that comply with applicable standards and best practices.

Personal Service

- We listen, respond quickly, and build lasting relationships.

Full-Service Support

- Access to tax, audit, and advisory experts in one place.



Contact an Advisor to Get Started



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