

FULL VALUATION REPORT



Strategic Business Partner

Create a new competitive advantage for agencies by aligning people, process & products



Data & Analytics Expert

Enable agencies to make more informed business decisions using technology & data



Change Agent & Innovator

Equip agencies with critical insights to help them thrive in an ever-changing marketplace



Trusted Advisor

Provide agencies with unbiased guidance that arms them with the knowledge to succeed

Gain an unbiased understanding of your agency's value and make more informed decisions about the future of your business using IntellAgents' **Valuation Services**, exclusively developed for independent agencies.

Let us be your trusted advisor. We're here to ensure small- to mid-sized agencies are empowered with the right tools to plan their agency's perpetuation.



What we need:



- Financials
- Books of business account information
- Employee data
- Ownership structure

What you receive:



- Fair market indication of value report
- Your agency's unique profile and risk factors
- *IA Insights*: Ways to improve agency value
- Factors affecting internal perpetuation

Pricing:



- ↓ \$2.5M in revenue: \$3,000
- ↑ \$2.5M in revenue: Call for pricing



Timeframe:

2-3 weeks from data submission