

# HELP WITH INDEPENDENT AGENCY VALUATION AND PERPETUATION STARTS HERE...



## VALUATION ASSISTANCE

Our Full Valuation and Perpetuation Services are for agency owners who are considering perpetuating internally, selling their agency to a third party, or even purchasing another. Our compassionate team of experts understands that your agency is your lifeblood, your reputation, and your legacy. We will provide guidance and advice as you navigate the steps of perpetuating your agency.



## BUSINESS PLANNING SESSION

Based on the preparedness and desire of the agency to perpetuate, IntellAgents will lead a one-day planning session to ensure that the owner/leadership goals are aligned.

After the business planning session, IntellAgents and agency leadership will review the big-picture perpetuation plan, including:

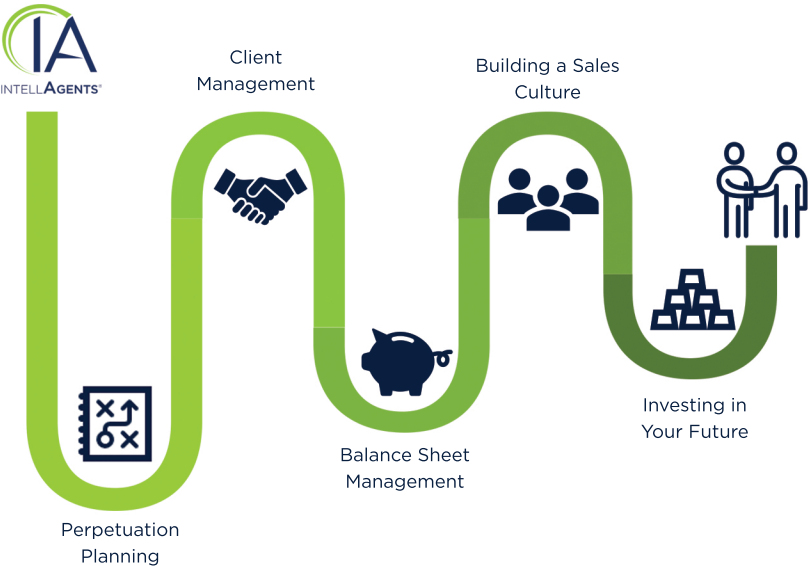
- Plans to transfer relationships, books of business and control of the agency
- Desired exit dates for key agency leaders
- Transfer of ownership to perpetuation candidates
  - (How much stock and when)
- Stock transfer mechanisms
  - (Gifting, agency redemption, etc.)



## PERPETUATION PLANNING

The process of valuing and perpetuating an agency is about so much more than a number. With IntellAgents, you'll have a passionate team of experts to guide you through the steps to perpetuate your agency internally or externally.

## WE'RE COMMITTED TO THE JOURNEY



**IntellAgents provides a robust range of consulting services designed to help independent agencies.**



IntellAgents is here to ensure independent insurance agencies are empowered with the right tools to plan their agency's perpetuation.

As the trusted advisor for independent agents, IntellAgent's valuation tools and services are designed to give you so much more than just a number.



## 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



## WHAT WE NEED

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



## PRICING

- Member: \$3,000
- Non-Member: \$3,500



## TIMEFRAME

- 2-3 weeks from data submissions



CAREY  
WALLACE

carey@intellagents.io

**Carey** has spent more than 20 years working with small businesses, dealing in all aspects of operations, including accounting and financial analysis, human capital management, business development, project and product management, and business intelligence. She is a dynamic leader with hands-on experience developing business valuations, performance scorecards, and succession planning tools that help customers prepare their businesses for a healthy transition of the organization to their next owner.

By completing five successful mergers, or acquisitions, nine private placements, and an IPO for a startup organization, Carey has demonstrated throughout her career that she can develop and implement thoughtful strategic plans, which she translates from theory to practical application by deploying tactics throughout the organization that produce effective results.



CRAIG  
NIESS

craig@intellagents.io

**Craig** is an accomplished manager with more than seven years of experience from a leading independent agency consulting firm where he advised over 100 independent agencies on their valuation, perpetuation and business planning needs. He is focused on helping customers grow, improve, and transition their organizations to the next owner. He has a prior valuation and consulting experience in the insurance industry. His experience in an innovative, market-disrupting consumer goods startup translates well to helping entrepreneurial independent agents understand their value.

**Craig** is a builder of teams, a leader, and motivates exemplary performance. He has his MBA in Marketing and Finance, and many years in business planning strategy, creating short and long-term business plans, financial models, projections and analysis to attract venture capital funding.



INDEPENDENT INSURANCE  
AGENTS of RHODE ISLAND



FOR MORE INFORMATION ON OUR VALUATION SERVICES  
CONTACT (800) 555-1742 OR VISIT INTELLAGENTS.IO

