

# 2021

## Valuation Software and Data Resources



CPA Practice  
Advisor  
**READERS'  
CHOICE**  
AWARDS | 2020



## Are You Concerned About...

- Producing **better valuations and damages calculations** in less time?
- **Increasing** productivity and consistency?
- Increasing analysis and report **quality**?

- **Business Valuation Data and Software**
- **Economic Damages Calculation Software**

# FIVE Valuation Applications, One Low Annual or Monthly Price



## Valuation Software Subscription

#1 Best-Selling Business Valuation Software

The ValuSource Valuation Software Suite gives you access to ALL of our valuation software products for ALL versions of Microsoft Office back to 2013, includes ALL software updates, PLUS technical support. Both single and multi-user licenses are available.

Software  
Subscription  
Includes



Professional business valuator readers voted  
ValuSource Pro, BVM Pro and Express Business  
Valuation: #1 Valuation Software

### 1 VALUSOURCE PRO

Business valuation software will streamline your valuation practice and allow you to produce better valuations (analysis and reports) in less time. ValuSource Pro (used by both NACVA and ISBA to train professional valuers), with over 90% market share, has been used by thousands of CPAs, valuers and financial professionals for over three decades.

### 2 VALUSOURCE PRO INTERNATIONAL

Do you ever need to value companies outside of the United States? ValuSource Pro International

is built around International Financial Reporting Standards (IFRS) instead of GAAP so you can provide comprehensive valuation analysis and reports based on IFRS.

### 3 BUSINESS VALUATION MANAGER™ PRO (FOR NACVA)

Business Valuation Manager Pro is a custom version of ValuSource Pro written for NACVA. BVM Pro contains two NACVA changes from ValuSource Pro including the addition of NACVA's Risk Rate Component Model and benefit stream statistical analysis.

### 4 EXPRESS BUSINESS VALUATION

Express Business Valuation is the "light" version of ValuSource Pro. The main differences are, it has a summary chart of accounts, no detailed DCF method and has fewer assumptions and options.

### 5 BUSINESS VALUATION REPORT WRITER

The Business Valuation Report Writer is a report module for ValuSource Pro, BVM Pro and Express Business Valuation that saves you up to 50% of the time it takes to prepare and review written business valuation reports. It comes with SSVS, USPAP and 59-60 reports.

## PLUS

### TECHNICAL SUPPORT

With the Software Subscription you get full technical support, including: support for technical issues like installation, program operation, database integration,

as well as access to our team of certified valuers to help you use the software to complete specific valuation engagements. It is like having a staff of valuation software experts on your team.

### COMPLETE DATABASE INTEGRATION

BVDataWorld integrates directly into all the valuation software in the SUITE.

**The subscription supports all versions of Office back to 2013, and you will always have access to the latest, most-compatible and optimized versions!**

### Valuation Software Subscription PRICING

ValuSource Software is only available as part of the Valuation Software Subscription.

Single-User .....\$1,195 / year  
or \$110 per month

ValuSource Pro ✓
ValuSource Pro International ✓
Business Valuation Manager Pro (for NACVA) ✓
Express Business Valuation ✓
Report Writer ✓ <small>(works with all valuation products)</small>
Visit website for more info and multi-user pricing.



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See videos, sample reports and get a FREE demo.

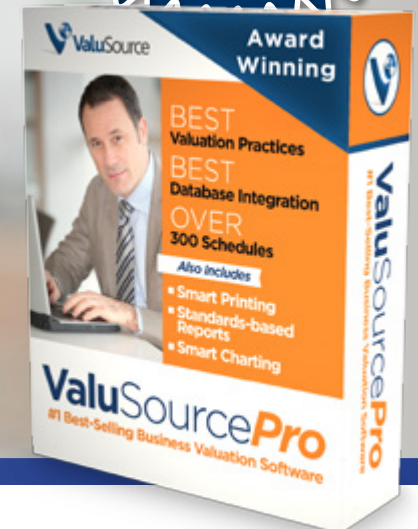


“As a Valuation Pro,  
I produce **BETTER** analysis  
and reports in much  
**LESS** time!”

- Darrell Dorrell, CPA, MBA, ASA, CVA, CMA, ABV, CFF  
Professional business valuator with over 20 years of experience.



Used by  
NACVA  
and ISBA  
Certification  
Courses



# ValuSourcePro

THE #1 BEST-SELLING Business Valuation Software



How do you complete professional valuations FASTER, more consistently, following BEST practices (whether experienced or new), with great reports, all at a price that saves MUCH more than it costs?

ValuSource Pro (used by both NACVA and ISBA to train professional valutors), with over 90% market share, has been used by thousands of CPAs, valutors and financial professionals for decades.

FIVE  
reasons to  
consider  
ValuSourcePro

## 1 FOLLOW BEST VALUATION PRACTICES

Smart Navigator guides you through the valuation best practice process and workflow with step-by-step sequential menus—ensuring you cover all the steps, whether novice or expert.

## 2 BEST DATABASE INTEGRATION

One-click integration that automatically populates your

schedule and narrative from 12 major databases. Plus, includes pre-built analyzers with graphics, scatter charts, filters, calculators, trends and other analytics—saving you dozens of hours.

## 3 MOST COMPREHENSIVE VALUATION SCHEDULES AND METHODOLOGIES

Includes 18 valuation methodologies and over 300 schedules to leverage industry best practices, then modify as needed.

## 4 HUNDREDS OF PAGES OF SMART AND FLEXIBLE CONTENT

The software framework, built on top of editable Excel worksheets, has built-in intelligence and transforms based on your assumptions. This saves beginners from making critical mistakes, while allowing experts to use as-is, or incorporate their existing spreadsheets and finish about 50% faster.

→ **Smartsheet Logic.** Automatically determines which rows and columns should be displayed.

→ **Smart Printing.** Makes it easy to print large spreadsheets.

→ **Smart Financial Statements.** Allows you to edit and perform financial statement analyses and the program will update every associated schedule.

→ **Smart Charting.** Automatically creates the correct number of columns based on the number of years of financial statements.

## 5 INTELLIGENT AND AUTOMATIC STANDARDS-BASED WRITTEN REPORTS

The optional report writer, built on top of Word, includes *Content Intelligence* to help automate the conditional narrative, hotlinks to automate changes and hundreds of pages of standards-based report templates (including 59-60, SSVS and USPAP) that evaluate over 400 variables within the analysis.

“This is the same software I received during my NACVA certification course. Great Stuff!”

## ValuationSoftware Subscription PRICING

ValuSource Software is only available as part of the Valuation Software Subscription.

Single-User .....\$1,195 / year  
or \$110 per month

- ValuSource Pro ✓
- ValuSource Pro International ✓
- Business Valuation Manager Pro (for NACVA) ✓
- Express Business Valuation ✓
- Report Writer ✓  
(works with all valuation products)

Visit website for more info and multi-user pricing.

Built around  
Excel and Word



Call (800) 825-8763  
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See videos, sample reports and get a FREE demo.



SAVE UP TO  
**77%**

**“I got the exact same two databases... plus FIVE more—for the same price!”**

- Frank Wisheart, CPA, ABV, CFE, CVA, MBA  
Respected valuator with over 20 years of experience.

Duff & Phelps Cost of Capital Navigator Basic is now included in levels

# BVDataWorld®

World's Largest Source for Valuation Databases

**FIVE** reasons to consider BVDataWorld

## 1 MOST VALUATION DATABASES

ValuSource provides 21 industry databases and resources—the largest selection of any valuation data supplier. Plus, all databases integrate with Excel and most with ValuSource Pro, BVM Pro and Express Business Valuation.

## 2 EXCLUSIVE BEST-OF-CLASS DATABASES

Also includes three databases that are 100% exclusive to ValuSource:

→ **RMA Annual Statement Studies Valuation Edition.** The industry's only comparative industry data, taken from over 275,000 actual business financial statements.

→ **ValuSource Market Comps.** The largest (over 49,000 comps) and oldest comparables database.

→ **Pluris DLOM Database™** The largest database of restricted stock transactions for calculating a discount for lack of marketability.

## 3 BEST WEB INTERFACE—WITH ANALYTICS

Access data with smart search. Includes pre-built Excel based analyzers with graphics, scatter charts, filters, calculators, trends and other analytics.

Automatic one-click integration with ValuSource Pro, BVM Pro and Express Business Valuation.

## 4 BEST TECH SUPPORT

Speak to technical support or to a Certified Business Valuator who can explain how to apply the data for your specific engagement.

## 5 BEST VALUE—UP TO 77% DISCOUNT

Available à la carte or in data bundles so you get more data for the same price and ensure you have your competitor's data sources if ever challenged in litigation.

## BONUS—\$995 VALUE

Purchase any à la carte database and **get EconAssist™ for FREE.** Includes National Economic Reports (January reports), over 1,100 archived industry and metro reports, 9000+ valuation articles, 2,300+ federal and state cases, over 800 conference presentations, compensation data, over 78,000 S-1 Filings, the Expert Witness Profiler, Around the Valuation World® monthly webcasts, free virtual courses and the Mentor Support Exchange

**“I was spending \$500 for one database. With BVDataWorld, I spent \$745 and got the exact same database, plus FIFTEEN more! Nothing else compares!”**

**Call Today**  
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See videos, sample reports and get a FREE demo.

# Essential Valuation Data and Resources— Bundled for One Low Annual Subscription Fee

BVDataWorld®

## Purchase a Database à la Carte

ValuSource Market Comps (Downloads Per Year)	\$640
BIZCOMPS® (Downloads Per Year)	\$629
Duff & Phelps Cost of Capital Navigator: U.S. Cost of Capital Module (Basic) (Downloads Per Year)	\$310
IRS Corporate Ratios	\$275
RMA Valuation Edition (Includes 10 Years of RMA Data)	\$995
Duff & Phelps Cost of Capital Navigator: U.S. Cost of Capital Module (Pro)	\$595
Pluris DLOM Database™	\$595
ValuSource M&A Comps	\$595
Mergerstat Review Premiums and Discounts	\$125
Mergerstat Review Price to Earnings Ratios	\$125
Guideline Public Company Database (Downloads Per Year)	
Valuation Reports Library	
National Economic Reports (Monthly and Quarterly Reports)	Jan Only
Around The Valuation World® (AVW) (Additional Fee for CPE Credit*)	
Archived Industry and Metro Reports (1,100+ Reports)	
Business Valuation Articles (9,000+ Articles)	
Federal & State Law Cases (2,300+ Cases)	
Conference Presentations (800+ Presentations)	
Compensation Data	
S-1 Filings (78,000+ Filings)	
Expert Witness Profiler	
Free Virtual Courses	
Mentor Support Exchange	
À La Carte Data Sources Discounts (Excludes Duff & Phelps)	5%
15% Off Valuation Software Subscription	

## BUNDLE & SAVE

	SAVE 77%	SAVE 72%	SAVE 62%	SAVE 55%	
	ECON ASSIST	SILVER	GOLD	PLATINUM	TITANIUM
ValuSource Market Comps (Downloads Per Year)	7	Unlimited	Unlimited	Unlimited	
BIZCOMPS® (Downloads Per Year)	3	7	10	10	
Duff & Phelps Cost of Capital Navigator: U.S. Cost of Capital Module (Basic) (Downloads Per Year)	3	7	10	Unlimited Navigator Pro	
IRS Corporate Ratios		•	•	•	
RMA Valuation Edition (Includes 10 Years of RMA Data)			•	•	
Duff & Phelps Cost of Capital Navigator: U.S. Cost of Capital Module (Pro)				Unlimited	
Pluris DLOM Database™				•	
ValuSource M&A Comps				•	
Mergerstat Review Premiums and Discounts				•	
Mergerstat Review Price to Earnings Ratios				•	
Guideline Public Company Database (Downloads Per Year)	7	10	Unlimited	Unlimited	
Valuation Reports Library	•	•	•	•	
National Economic Reports (Monthly and Quarterly Reports)	Jan Only	•	•	•	
Around The Valuation World® (AVW) (Additional Fee for CPE Credit*)	•	•	•	•	
Archived Industry and Metro Reports (1,100+ Reports)	•	•	•	•	
Business Valuation Articles (9,000+ Articles)	•	•	•	•	
Federal & State Law Cases (2,300+ Cases)	•	•	•	•	
Conference Presentations (800+ Presentations)	•	•	•	•	
Compensation Data	•	•	•	•	
S-1 Filings (78,000+ Filings)	•	•	•	•	
Expert Witness Profiler	•	•	•	•	
Free Virtual Courses	•	•	•	•	
Mentor Support Exchange	•	•	•	•	
À La Carte Data Sources Discounts (Excludes Duff & Phelps)	5%	10%	15%	N/A	
15% Off Valuation Software Subscription				•	
<b>TOTAL BUNDLE VALUE†</b>	<b>\$995</b>	<b>\$1,975</b>	<b>\$2,676</b>	<b>\$4,064</b>	<b>\$6,174</b>

Actual Bundle Costs‡ Single-user / Yearly§

<b>FREE</b> with à la carte database purchase	<b>\$445</b>	<b>\$745</b>	<b>\$1,545</b>	<b>\$2,795</b>
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## Bundle Add-Ons (Additional Yearly Fee Required§)

First Research Unlimited	\$1,099	\$1,099	\$1,044	\$990	\$935
Bizminer Premium (includes 40 downloads per year)	\$1,279	\$1,279	\$1,279	\$1,279	\$1,279
RCReports Premium	\$1,049	\$1,049	\$995	\$945	\$890
Unlimited CPE On-Demand Courses	\$995	\$795	\$595	\$395	\$195
Surgent CPE: NASBA Qualified Self-Study Courses		\$240	\$240	\$240	\$240

Note: Prices and products are subject to change.  
\* To receive CPE for attending this course, which awards bonus points for NACVA's recertification, there is an additional annual cost of \$350.  
† Bundle value is a composition based on established retail prices if purchased separately, what competitors charge for the data/service if we do not sell it separately, and estimates of what we would charge on data not found elsewhere if we did sell the data separately.  
‡ See website for details, conditions, and upgrading to unlimited BIZCOMPS. EconAssist is free with à la carte database purchase.  
§ Monthly and multi-user options available (excluding Bizminer and RCReports). See website for details.



Exclusively Available from ValuSource

## UPDATED AND IMPROVED!

- The ValuSource Market Comps has been enhanced
- Removed duplicates
  - Clarified the definitions
  - Search defaults to 10 years (but optionally search up to 30)



## ValuSource Market Comps

ValuSource Market Comps is the largest and most useful collection of transaction data for small to medium businesses. It is an invaluable resource for the market approach to valuation of privately held businesses.

### FIVE reasons to consider ValuSourceMarket Comps

#### 1 OLDEST AND LARGEST COLLECTION OF TRANSACTION DATA

With over 49,000 comparable transactions spanning 30 years, the data is an indispensable resource for the market approach to valuation—much bigger than similar competing databases like BIZCOMPS® (12,000+) or Pratt's Stats (27,000+)—at a much lower price!

#### 2 INTEGRATES WITH EXCEL AND VALUSOURCE VALUATION APPLICATIONS

The ValuSource Market Comps Database downloads directly into Excel as well as into the ValuSource valuation applications, including: ValuSource Pro, BVM Pro and Express Business Valuation.

#### 3 SMART SEARCHING

Newly added flexibility means you can search on SIC code, description, sale date (defaults to 10 years but optionally up to 30), location, sales, discretionary earnings, price, price to sales and price to discretionary earnings.

#### 4 ANALYZER TOOLS

In addition to exporting data directly into Excel, you also receive two powerful Excel-based analyzers:

→ **Comparable Analyzer.** Uses regression lines (ordinary least squares), histograms, statistics and scatter charts to describe the population.

→ **DMDM Analyzer.** Uses the direct market data method to rank your subject company against the industry range provided by the comparable transactions.

Combined, these tools help you make sense of the comparable data so you can make better decisions about how to apply the data in a valuation as well as how to defend those decisions.

#### 5 CURRENT DATA

The ValuSource Market Comps Database is updated quarterly so you always have the most up-to-date information available.

#### ValuSource Market Comps PRICING

Single-User .....	\$640
Multi-User .....	\$1,025

See page 7 for bundles that include this database!



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Exclusively Available from ValuSource

## ValuSource M&A Comps has 200% MORE DEALS, providing more options and better comps



## ValuSource M&A Comps

ValuSource M&A Comps provides over 10,000 comparable sales transactions for private mid-market companies over the prior 10 years. Data is collected from public SEC filings when public companies acquire a private company.

### FIVE reasons to consider ValuSource M&A Comps

#### 1 COMPREHENSIVE CORPORATE TRANSACTION DATA

With the ValuSource M&A Comps database, you receive hard-to-obtain corporate transaction details for private mid-market companies. Includes multiples on the sales of mid-size companies, so your valuations are based on real data.

#### 2 REALTIME DATA

Powered by Tagnifi, ValuSource M&A Comps data is continuously updated. With hundreds of quality control checks to make sure the data is accurate and complete, means you always have access to the latest and most accurate data.

#### 3 INTEGRATES WITH EXCEL AND VALUSOURCE VALUATION APPLICATIONS

ValuSource M&A Comps downloads directly into Excel as well as into the ValuSource valuation applications, including: ValuSource Pro, BVM Pro and Express Business Valuation.

#### 4 CUSTOM SEARCH OPTION

Perform custom searches for data by any field. Easily distinguish between Stock and Asset Transactions or select data by SIC or description.

#### 5 EASILY ANALYZE AND CHART DATA

Statistical analysis (high, low, mean, median, standard deviation) of selected transactions, including: Revenue, Enterprise Value, Equity Value, EBITDA, EBIT, Net Income and Book Value.

Charts of Enterprise Value to Annualized Revenue, Enterprise Value to EBITDA, Enterprise Value to EBIT, Equity Value to Net Income and Equity Value to Book Value.

#### ValuSource M&A Comps PRICING

Single-User .....	\$595
Multi-User .....	\$955

See page 7 for bundles that include this database!



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**NEW! Now Included in BVDataWorld Bundles at no additional cost, OR BUY standalone!**

# Duff & Phelps Cost of Capital Navigator: U.S. Cost of Capital Module (Basic\*) **NOW INCLUDED IN BVDataWorld<sup>®</sup>** Silver, **Gold** or **Platinum** subscriptions. **Titanium** continues to include **the U.S. Cost of Capital Module (Pro).**

**Save up to 40% visit**  
[www.valusource.com/navigatorpackages](http://www.valusource.com/navigatorpackages)



## Duff & Phelps Cost of Capital Navigator: U.S. Cost of Capital Module

The Duff & Phelps Cost of Capital Navigator is an interactive, web-based platform that guides valuers through the steps of calculating Cost of Capital, a key component of any valuation analysis.

**FOUR**  
reasons to consider  
Duff & Phelps  
Cost of Capital  
Navigator: U.S.  
Cost of Capital  
Module

### 1 "SIZE" TABLES

Includes CRSP Deciles Size Study and Risk Premium Report size premia tables that are viewable within the Navigator.

### 2 ESTIMATE WACC

Develop into weighted average cost of capital (WACC) estimates.

### 3 ENHANCED OUTPUTS

Export more robust and comprehensive documentation of the user's cost of capital assumptions, sources, analysis and results as PDF or in Excel.

### 4 EXCEL ADD-IN

This powerful new tool enables users to directly import cost of capital data in their own Excel spreadsheets.

### DATA INCLUDED IN THE U.S. COST OF CAPITAL MODULE

#### 1 SIZE PREMIA AND RISK PREMIA

- CRSP Deciles 1-10 size premia, plus the 10th Decile split
- Risk Premium Report Size Study size premia and "risk premia over the risk-free-rate"

→ Risk Premium Report Risk Study "risk premia over the risk-free rate"

→ High-Financial-Risk Study size premia and "risk premia over the risk-free rate"

→ Comparative Risk Study (fundamental risks of companies comprising Risk Premium Report Size Study portfolios)

#### 2 RISK-FREE RATES

→ Spot long-term risk-free rates (from the Federal Reserve, updated daily)

→ Duff & Phelps long-term normalized risk-free rate (adjusted for impact of flights-to-quality, actions of the Federal Reserve and inflation expectations)

#### 3 U.S. EQUITY RISK PREMIA (ERPS)

- 1926-present Historical (i.e., realized) ERP
- 1926-present Supply-side ERP
- Duff & Phelps Recommended ERP (reflecting current point in business cycle)

#### 4 BETA

- Industry-level betas (Full-Information, Vasicek-Adjusted, Sum and High-Financial-Risk Betas)
- Industry Risk Premia for use in the Build-up Method
- Debt betas (for unlevering and relevering betas)

#### 5 COMPANY LISTS

- List of companies used to calculate Full-Information Betas and Industry Risk Premia (updated quarterly)
- List of companies used to calculate "Pure-Play" U.S. industry statistics (updated quarterly)

\* The U.S. Cost of Capital Module Basic Subscription has EVERYTHING contained in the regular Basic U.S. Cost of Capital Module, but limits the number of cost of capital analyses/downloads based on your subscription level. The limits are three cost of capital analyses/downloads for Silver, seven for Gold and ten for Platinum, Data is updated quarterly.

#### U.S. Cost of Capital Module

##### Basic Version

(two most recent years)  
Single-User ..... \$310  
+\$129 per Basic additional user

##### Pro Version

(all years 1999-present)  
Single-User ..... \$595  
+\$299 per Pro additional user

#### U.S. Industry Benchmarking Module

Provides over 300 critical data points (depending on data availability) for approximately 170 U.S. industries

##### Basic Version

(two most recent years, updated quarterly)  
Single-User ..... \$675  
+\$299 per Basic additional user

##### Pro Version

(all years 2014-present, updated quarterly)  
Single-User ..... \$995  
+\$449 per Pro additional user

#### International Cost of Capital Module

Provides users with guidance and data for estimating cost of capital on a global scale

##### Basic Version

(two most recent years, updated quarterly)  
Single-User ..... \$995  
+\$449 per Basic additional user

##### Pro Version

(all years 2014-present, updated quarterly)  
Single-User ..... \$1,495  
+\$649 per Pro additional user

#### International Industry Benchmarking Module

Industry-level statistics for approximately 90 industries in four global regions with data going back to March 2015.

##### Basic Version

(two most recent years, updated quarterly)  
Single User ..... \$675  
+\$299 per Basic additional user

##### Pro Version

(all years 2015-present, updated quarterly)  
Single-User ..... \$995  
+\$449 per Pro additional user



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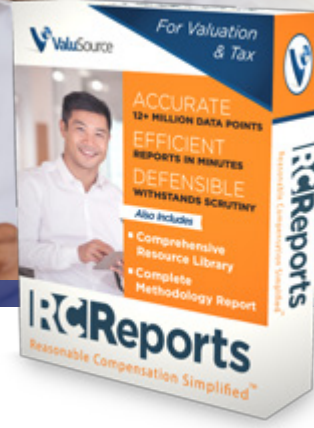
See videos, sample reports and get a FREE demo.



## #1 Reasonable Compensation Analysis Solution

“Whereas you may have to spend 4 hours, 6 hours or in some cases, 2 or 3 days to determine Reasonable Compensation for a given party, now this can be done in a matter of minutes with several scenarios.”

- Michael Gregory, CVA, CBA, ASA, (former IRS Agent)  
Reasonable compensation expert.



NOW AVAILABLE BUNDLE DEALS

# RCReports

RCReports features an exclusive wage database with more than 12.9 million data points and a simple system to generate lightning-fast Reasonable Compensation reports that are objective, accurate and backed by proprietary methodology combining IRS criteria, court rulings and geographic data.

FIVE reasons to consider RCReports

### 1 SOLVES THE COMPENSATION COMPLEXITY PROBLEM

RCReports provides an exclusive wage database with more than 12,917,500 wage data points, (of which, more than 60% are unique to RCReports) covering virtually every possible position and geographic region, it is easy to determine a business owner's Reasonable Compensation broken down by job title, duties and percentage of time spent.

### 2 SAVES TIME AND MONEY

Access reports for planning, compliance or normalization within minutes through an intuitive, cloud-based platform, removing all guesswork and providing full documentation and transparency around your client's compensation.

### 3 INDEPENDENT THIRD-PARTY SOURCE

With built-in industry, legal, IRS criteria and salary data intelligence, tax advisors, valuers and forensic accountants gain access to credible and independent Reasonable Compensation calculations with guaranteed cover in the event of an IRS audit or litigation. Every report provides you with supporting resources, including: case law, IRS rulings, whitepapers and more.

### 4 COMPREHENSIVE RESOURCE LIBRARY

Every Reasonable Compensation report is supported by the Resource Library, which contains tools and documents to help you get the most out of your subscription. It includes tools specific to business valuers from the IRS as well as general information about Reasonable Compensation. From customizable letters to court ruling analyses to white papers, the Resource Library is worth the price alone.

### 5 COMPREHENSIVE METHODOLOGY REPORT

RCReports offers four different reports to choose from: S Corp and C Corp, Tax Compliance, Normalizing Compensation for Valuation and Planning, as well as three approaches: Cost, Market and Income. Additionally, you can present your client with a digital interview to help you gain an understanding of how they spend their time and what services they provide for their business.

### RCReports PRICING

Basic (2 seats)	\$749
Premium (3 seats)	\$1,049

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See videos, sample reports and get a FREE demo.

## Industry and geographic data covering 9,000 industries by zip code, county, metro or state.

### Bizminer Industry Market Series 3-YEAR INDUSTRY MARKET RESEARCH TRENDS

with monthly updates. 9,000 industries—any U.S., or local market area.

Competitive analysis, mapped intelligence, easy to customize.



NOW AVAILABLE BUNDLE DEALS

# Bizminer Suite

Bizminer is the gold standard for industry and geographic data. There is simply no other analysis out there that consistently reports at Bizminer's level of detail. With 9,000 lines of business in thousands of U.S. market areas included in their analysis, you will get the most specific and accurate information and metrics not available from any other source.

FOUR reasons to consider Bizminer

### 1 SAVES TIME AND MONEY

Bizminer has the most cost-effective industry and geographic data on thousands of U.S. market areas. Reports are available in both Excel and PDF formats and are delivered to you immediately.

### 2 MOST CURRENT DATA

Access over a billion data points with more sources than any other similar report. Sources include the IRS, U.S. Economic Census, Bureau of Labor and more. The Bizminer Premium option includes over five million reports.

### 3 DETAILED FINANCIAL ANALYSIS

- U.S. Industry Financial Profiles
- Local Industry Financial Profiles
- BizBenchmarker is now consolidated into this product
- Sole Proprietor Industry Financial Series
- Includes expanded metrics and ratios

### 4 DETAILED MARKET ANALYSIS

- Compelling industry market research trends for 9,000 lines of business
- Retail Sales per Square Foot Report
- Available by radius as well as U.S.-State-Metro-County-Zip

### The Bizminer financial and industry market databases:

**Bizminer Local Industry Financial Reports**—Rock-solid industry financial ratios, balance sheet and detailed Profit & Loss statements, State and Metro reports: 36 financial ratios. Co-brand and customize. (Starter & Premium)

**Bizminer U.S. Industry Financial Reports**—Rock-solid industry financial ratios, balance sheet and detailed Profit & Loss statements. US reports with 34 financial ratios; three-five-year reports and up to 10 more legacy data years. Co-brand and customize. (Starter & Premium)

**Bizminer Industry Market-Series**—Three-year industry market research trends with monthly updates. 9,000 industries—any U.S. or local market area. Competitive analysis, mapped intelligence, easy to customize. (Premium ONLY)

### Bizminer PRICING

Bizminer Starter .....\$799  
(Includes 20 downloads per year)

Bizminer Premium .....\$1,279  
(Includes 40 downloads per year)

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Covers Over 1,000 Industry Segments and Used by 90% of Fortune 500

“We found the reports to be a **CLEAR, CONCISE, ONE STOP RESOURCE** for accessing pertinent industry data.”

- Clayton R. Lee, II  
Executive Vice President,  
Credit Administration, Regions Bank

NOW INCLUDES 17,000 ARCHIVED REPORTS



INTRODUCING

# FirstResearch

by Dun & Bradstreet

## THE #1 SOURCE for Industry Profiles

You often need to know your client's industry and unique markets well enough to understand their impact on your valuation. You could spend hours with generic industry reports, questionable internet sources or get all the right information you need in minutes.

FIVE reasons to consider First Research

### 1 COMPREHENSIVE INDUSTRY COVERAGE

First Research provides industry profiles covering over 1,000 industry segments, including a comprehensive suite of local and national data.

### 2 MOST ACCURATE AND UP-TO-DATE

First Research industry profiles contain critical analysis, statistics and forecasts typically updated monthly, quarterly or annually to remain current. It is supported by a team of seasoned industry researchers with deep knowledge

in banking, finance, computers, telecommunication, manufacturing, media, retail and real estate.

### 3 THE RIGHT KIND OF INFORMATION

First Research has all the information you need in one place to help you quickly grasp how an industry operates, the competitive landscape and how your client stacks up. The report includes: complete industry snapshots, compiles regulatory requirements and outside influences, monthly economic insights by state and province and industry performance against peers (with financial data).

### 4 FASTEST TO INTEGRATE

You get the right kind of information, so you can copy and paste directly into your valuation report—saving you time.

### 5 AFFORDABLE PRICING AND BEST VALUE

First Research is one of the most affordable industry reports—almost half the price of any major competitor (with more reports and much greater accuracy).

#### FirstResearch PRICING

Unlimited Subscription	\$1,099
Single Report	\$139

See page 7 for bundles that include this database!

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“Consistently produces **professional reports** with a step-by-step process that's fast and **EASY TO USE.**”

- Jeff Harwell, Principal at Harwell & Company  
Professional business valuator and damages specialist with over 35 years of experience.



# DamagesAdvocate

## THE #1 BEST-SELLING Damage Calculation Software

Whether a novice damages consultant, who may miss the critical points or not have many models built yet, or the expert who is spending too much time on reports, there is no longer a reason to perform this analysis manually.

SIX reasons to consider Damages Advocate

### 1 GUIDES YOU THROUGH DAMAGE CALCULATIONS BEST PRACTICES

Includes *Smart Navigator* that walks you through the best practices with sequential menus to ensure you do not miss critical analysis.

### 2 THE BEST ONE-CLICK DATABASE INTEGRATION

Automatically populates your schedule and narrative from seven major damages database categories:

### 3 MOST COMPREHENSIVE DAMAGE CALCULATION WORKFLOW

Includes Comprehensive Workflow Decision Trees that cover the input, assumptions and databases for:

retirement, life span, employment, dependents, household services, medical expenses and other damages.

### 4 INCLUDES SEVEN DATABASES—FREE

Databases cover: life expectancy, earnings by occupation, fringe benefits, pre-trial earnings growth, life expectancy of dependents, household services and pre-trial growth of household services.

### 5 SMART AND FLEXIBLE CONTENT—LIKE AN ECONOMIST-IN-A-BOX

Built-in intelligent schedules transform based on your assumptions and saves beginners from making critical mistakes, while allowing experts to finish much quicker.

Includes *Smart Logic* which looks at your assumptions and intelligently determines which fields and choices should be displayed. Plus, the output is delivered in Word and Excel, so it is easy to modify.

### 6 INTELLIGENT AND AUTOMATIC WRITTEN REPORTS

The report writer creates the narrative, work schedules and exports to Excel, Word and PDF. It includes a standard 13-page damages report with all the necessary schedules to defend your damages position. Plus, any changes are hot-linked and ripple through your damages report automatically.

#### DamagesAdvocate PRICING

Annual subscription prices.

One Module	\$495
Two Modules	\$795
Three Modules	\$1,095

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**Fast and Accurate Reasonable Compensation Analysis** with RCReports Featuring Matthew J. Pontiff, CPA, ABV, CVA, CFF

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See what Frank Wisheart, CPA, ABV, CFE, CVA, MAFF, says about **why he relies on** ValuSource software

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