



IIAV has partnered with the Ohio Insurance Agents to offer our members access to IA Valuations, an organization that prepares valuations exclusively for independent agency owners. Getting a valuation of your insurance agency is not only an important business decision, but also a tool for understanding the fair market value of what is likely your greatest financial asset. Below is an introduction of who they are, what they do, and why they do it.

IA Valuations' mission is to help agency owners realize and maximize their value while also protecting the independent agency system. Our mission drives what we do and why we do it. We are mission-driven and committed to the relationships we build. The valuation process allows us to get an intimate look into each agency, which builds deep connections and, often, long-term business relationships. In addition to valuation services, IA Valuations provides perpetuation planning, financial modeling, buy-sell advising, and other related insurance agency business consulting.

IA Valuations prides itself on providing more than just a number to agencies. We strive to also provide a pathway for growth. The valuation report will give insights to the owners on opportunities to grow, how to maximize value, and how to best position your agency for long-term wealth building. Every single agency is different, so each engagement is tailored to the individual agency's specific needs. After reviewing and analyzing all your data, you will get a customized and individual 40-page report.

The IA Valuations team has completed over 350 insurance agency valuations in their collective careers and is made up of passionate and highly skilled professionals. The team is comprised of financial analysts who have the most practical experience and prestigious education in their field. They each have a deep understanding of the insurance industry and are knowledgeable of relevant benchmarks to accurately measure your agency's performance.

On top of providing a valuable service to individual agency owners, the IA Valuations team has been working to build a robust data platform to use to analyze the collective data. The more valuations and consulting engagements performed by IA Valuations, the richer and more detailed data and reports will follow, which can then be used to further help agency owners.

IA Valuations also places a strong emphasis on the fact that these services are accessible and affordable for all agency owners. Many of the valuations are provided to an underserved and overlooked constituency in the IA System: small to mid-sized agencies. These agencies are often not the focus of consultative services and private equity acquisitions and therefore are devoid of insights to help them grow and improve agency value, despite the ever-present need.

Our long-term goal for IA Valuations is to get every insurance agency owner an annual valuation of their agency. The belief is that this is the equivalent of receiving your annual

statement on the performance of a financial investment. Your agency is a significant financial asset in your portfolio, and you should have a solid, accurate, and up-to-date understanding of the value of that asset.

You value your clients, we value your agency! Reach out to [contact@iavaluations.com](mailto:contact@iavaluations.com) to get started or learn more about our services.

Learn how to grow & maximize your agency value with IA Valuations!

[iavaluations.com](http://iavaluations.com)

