



# BUSINESS VALUATION AND LITIGATION SUPPORT

[www.cdcpa.com](http://www.cdcpa.com) | 561-832-9292

## FIRM SERVICES

Caler, Donten, Levine, Cohen, Porter & Veil, P.A. is committed to maintaining the highest professional standards. We are a firm that has both the ability to perform accounting, auditing, tax, business valuation, litigation support and family office services, and the expertise to provide quality and timely services through personal attention and an in-depth understanding of your needs.



## BUSINESS VALUATION

Closely held businesses, personal and family ownership interests and professional practices may require valuations for many different reasons. CDL provides clear, concise, independent and objective business valuations to assist with mergers and acquisitions, tax planning and estate and gift tax planning and compliance. We also assist in dispute resolution settings such as divorce, commercial damages or civil litigation.

Our professionals include individuals who have earned the designations ABV (Accredited in Business Valuation) and CFF (Certified in Financial Forensics), as well as CPA (Certified Public Accountant) from the American Institute of Certified Public Accountants.

Whether you are thinking of valuing your business for sale, a pre-nuptial agreement, reorganization, financing or

a distribution of estate and trust assets, our professionals utilize their expertise and understanding of complex situations to provide you with creative solutions. Don't think of valuation as something you will be concerned about some time in the future when we can help you determine the best course of action today.

## SPECIFIC VALUATION SERVICES INCLUDE:

### Tax Compliance

- CLOSELY HELD STOCK FOR ESTATE AND GIFT TAX PLANNING AND COMPLIANCE
- CHARITABLE DEDUCTIONS
- FAMILY LIMITED PARTNERSHIPS AND LIMITED LIABILITY COMPANIES

### Corporate Valuation

- CORPORATE RESTRUCTURING/REORGANIZATION
- BUY/SELL AGREEMENTS
- MERGERS & ACQUISITIONS



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## LITIGATION SUPPORT SERVICES FOR ECONOMIC DAMAGES & LOST PROFITS

The calculation of economic damages and lost profits is an important area of litigation support. Qualified professionals with a solid understanding of these services are an essential part of any litigation team.

At Caler, Donten, Levine, Cohen, Porter & Veil, P.A., our industry experience and technical expertise enable us to assist attorneys in these matters.

### **We provide objective, independent services including:**

- INCOME ANALYSES
- ANALYSES OF NECESSITATED MEDICAL COSTS
- DETERMINATION OF PAST AND FUTURE LOSSES
- ADJUSTMENTS FOR PERSONAL CONSUMPTION
- ADJUSTMENTS FOR INCOME AND PAYROLL TAXES
- ADJUSTMENTS FOR THE VALUE OF LOST HOUSEHOLD SERVICES
- ASSISTANCE WITH ATTORNEY PREPARATIONS FOR DEPOSITION AND TRIAL

### **Economic damage may occur in relation to a number of events, including:**

- BUSINESS INTERRUPTION
- BREACH OF CONTRACT
- COMMERCIAL LITIGATION
- WRONGFUL DEATH AND WRONGFUL TERMINATION
- PERSONAL INJURY
- FRAUD

## LITIGATION SUPPORT SERVICES FOR MARITAL DISSOLUTION

Divorce can be complicated, contentious and often emotional. The engagement of an experienced financial expert will provide a concise and clear analysis of individual situations. The earlier Caler, Donten, Levine, Cohen, Porter & Veil, P.A. is engaged the better, as we can assist in all aspects of equitable distribution and settlement, including:

- PREPARATION OF FINANCIAL AFFIDAVITS/DECLARATIONS
- ANALYSES OF PERSONAL AND BUSINESS FINANCIAL INFORMATION
- DETERMINATION OF SPOUSAL INCOME
- TRACING OF ASSETS (MARITAL AND NON-MARITAL)
- LIFESTYLE ANALYSES
- VALUATION OF BUSINESSES AND BUSINESS INTERESTS
- ASSISTANCE IN THE STRUCTURING OF SETTLEMENT OFFERS AND AGREEMENTS

### **It is especially beneficial to retain a litigation support professional in the following circumstances. When:**

- UNREPORTED OR UNDERREPORTED INCOME OR ASSETS ARE ALLEGED
- ONE OR BOTH SPOUSES IS SELF-EMPLOYED
- MARITAL AND NON-MARITAL PROPERTY EXISTS OR IS ALLEGED
- A LIFESTYLE ANALYSIS IS NEEDED
- ONE SPOUSE IS UNACQUAINTED WITH FAMILY FINANCES
- COMPLEX FINANCIAL INSTRUMENTS ARE INCLUDED IN THE MARITAL PROPERTY
- PENSIONS, 401(K) PLANS AND OTHER RETIREMENT PLANS EXIST
- FINANCIAL RECORDS MUST BE RECONSTRUCTED
- A CLOSELY-HELD BUSINESS OR PROFESSIONAL PRACTICE IS INCLUDED IN THE MARITAL ESTATE