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Accurate Business Valuations for Accountants and Financial Planners

As a financial planner or accountant, accuracy is of the utmost importance in order to perform your job effectively. When it comes to clients with businesses, a business valuation is of great importance and can provide you with the information you need to accurately and effectively plan for your client's financial future. In this article, we will discuss the benefits that business valuations hold for accountants and financial planners, as well as explain how Business for Sale can help you.

Published on: **7th October 2025**
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The Benefits of Business Valuations for Financial Planners

As an accountant or financial advisor with clients who own businesses an accurate business valuation is an extremely important metric to have. The information gained from a business valuation can help you assist your client in a more comprehensive manner, and here is why.

- **Determine Business Value**: As is expected, a business valuation will determine what the value of a business is in the current South African market. This will be beneficial if your client is looking to sell their business, as you will be able to help them plan for the sale in a comprehensive manner. This is just as important if the owner is planning on transferring the ownership of the business to a family member or employee. In such instances, You will be able to help your client determine a fair price that will benefit both

parties.

- **Develop Financial Plan**: One of the most important aspects of being a financial planner, is helping your client develop a comprehensive and smart financial plan. Knowing the true value of their business will help you develop a secure and realistic financial plan. You will be able to accurately determine whether your client should and could further invest in the business, take on debt, or pursue other financial opportunities.
- **Identify Areas of Improvement**: If a client wants to improve their business and is struggling to do so, a business valuation could assist in identifying the problematic areas within the business. As a financial planner, you will be able to utilise this information to help them devise a plan for improvement and growth.
- **Support Strategic Planning**: Strategic planning should always be at the forefront of a business owner's mind. Armed with the information gathered from a business valuation, a financial planner will be able to devise a strategic solid financial plan to prepare for the future. Therefore, you will more accurately be able to devise a plan that aligns with your client's financial goals.
- **Facilitate Estate Planning**: While an unfortunate part of the job, estate planning is important. A business valuation will assist financial planners in ensuring the business is correctly valued for the possibility of a business owner's passing. One will therefore be sure that the business value is correct for the purpose of estate tax.