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## **Family-Owned Business Valuation** **Clint Bentz – Boldt, Carlisle + Smith**

Tuesday, February 10, 2015  
Kroc Community Center, Salem OR

### **Background**

Business valuation is a topic of great importance for family-owned businesses. The value of your business can directly impact your estate planning, how you deal with key employees, and your plans for growth or ownership transition to name just a few. It's just too important not to get right. In this session we'll look at the building blocks and the different approaches one can take for family business valuation. We will also cover some common questions such as what are the fundamental steps one should take to prepare for a valuation, and how do you go about finding a valuation professional?

### **More Information**

[Why Should I Bother Valuing My Family Business?](http://www.forbes.com/sites/steveparrish/2013/12/03/why-should-i-bother-valuing-my-business/) (2013) Steve Parrish, Forbes online,  
<http://www.forbes.com/sites/steveparrish/2013/12/03/why-should-i-bother-valuing-my-business/>

[The Family Business Guide Family](#) (2010). Frederick Lipman, Palgrave Macmillan

[Family Business, 4<sup>th</sup> Ed.](#) (2014). Ernesto Poza & Mary Dougherty, South-Western CENGAGE Learning

[Ties to the Land: Your Family Forest Heritage](http://business.oregonstate.edu/familybusinessonline/ties-land), (2012), Clint Bentz, et al., Oregon State University,  
<http://business.oregonstate.edu/familybusinessonline/ties-land>

### **Austin Family Business Program Resources**

Advisor Search listing of experienced family business professionals:  
<http://business.oregonstate.edu/familybusinessonline/advisor-search>

Our audio podcast series is available for free on iTunes University (search for Family Business 360) or on our website at: <http://business.oregonstate.edu/familybusinessonline/podcasts>. We talk to the expert presenters from the Family Business 360 series

Join the Austin Family Business Program LinkedIn group to stay up to date on upcoming events and programming. The group can be found at <http://www.linkedin.com/groups/Austin-Family-Business-Program-5188170>

### **Presenter: Clint Bentz – Boldt, Carlisle + Smith**

Clint Bentz is a Partner with Boldt, Carlisle + Smith, LLC, a full-service CPA firm with offices located in Albany, Salem and Stayton, Oregon. He is both a Certified Public Accountant and a Certified Management Accountant. After working as a corporate controller for several years, he entered public practice in 1989, providing professional tax, estate planning, and business consulting services to

individuals, partnerships and corporate clients. A large part of his practice is devoted to serving the special needs of agricultural and timber clients.

Clint is a frequent contributor for various publications on taxation and estate planning issues, and is a popular speaker on estate planning and taxation issues for both lay audiences and tax professionals. His most recent work is entitled "Ties to the Land: Your Family Forest Heritage" published in partnership with the OSU Extension Service and the Austin Family Business Program. He is a member of the Oregon Society of CPA's, the American Institute of CPA's, and the Institute of Management Accountants.

Clint is the past chairman of the American Forest Foundation, and a board member of the Oregon Tree Farm System. He is a Master Woodland Manager, and is a co-founder and current President of the Oregon Aquaculture Association. He has served as a member and technical advisor to several Oregon Board of Forestry working groups, and recently helped author the overhaul of Oregon's property tax program for small woodland owners. He was recently appointed by the Oregon legislature to a board tasked with the overhaul of Oregon's inheritance tax system.

Clint is a managing member of the Blue Den Ranch LLC, a 700-acre family tree farm partnership. Clint and his parents, Ron & Barbara, were honored as the 2002 National Outstanding Tree Farmers of the Year.