

CROSS-SELLING GUIDE

Cross-selling at Amplēo is about helping our clients unlock their full potential by providing the right expertise at the right time. Many businesses face challenges beyond their initial engagement—whether it's financial strategy, marketing leadership, tax compliance, valuation insights, or business restructuring. By proactively identifying client needs and introducing them to our specialized teams, we create more value, strengthen relationships, and drive better outcomes. A simple conversation can reveal gaps that our experts can fill, making referrals seamless and ensuring that clients receive comprehensive support tailored to their growth and stability.

This guide is designed to provide a simple way to (1) identify whether your clients need additional services and (2) make those introductions. In addition to building Amplēo and supporting clients, you will be eligible for referral commissions for 12 months.





Understanding the true value of your business is essential for making informed decisions about growth, funding, and exit strategies, but many business owners struggle to access accurate, data-driven valuations. Peak Business Valuation provides business owners and investors with expert valuation analysis, financial insights, and market intelligence to confidently buy, sell, or scale their business.

SYMPTOMS & QUESTIONS

Are you . . .

- . . . uncertain about the current value of your business?
- . . . preparing to buy, sell, or raise capital from investors?
- . . . facing estate planning, partnership transitions, or shareholder buyouts?
- . . . looking for data-driven insights to maximize business value?

SOLUTION

For growing companies, lacking a clear and data-driven understanding of business value can lead to missed opportunities, inaccurate financial planning, and undervaluation during key transactions.

We bridge that gap by offering the following:

- **Business Valuation** – Accurate assessments for transactions, investments, and strategic planning
- **Financial Benchmarking** – Industry comparisons to highlight growth opportunities
- **Exit and Investment Strategy** – Preparing businesses for sale or capital raises
- **Partnership and Shareholder Buyout Analysis** – Ensuring fair and accurate valuations
- **Deferred Compensation** – Compliance with IRC 409a for the issuance of stock options, phantom units, and profits interests
- **Gift and Estate Tax Planning** – Provides clarity and compliance, ensuring accurate asset transfer values to facilitate seamless estate planning and gifting strategies
- **Litigation** – Our expert business valuation services deliver clear, defensible analysis essential for resolving divorce settlements or partnership disputes

NEXT STEPS

Step 1: Email the referral introductions to Ryan Hutchins at ryan@peakbusinessvaluation.com and CC bd@ampleo.com.

Step 2: The Amplēo partner adds the lead to HubSpot.