CVA	•	**3 Valuation Approaches**	•	**EN / ES**	•	**Fixed-Fee**
NACVA Certified		Applied		Fully Bilingual		Transparent Pricing

THE CHALLENGE

Your clients need business valuations for buy-sell agreements, succession planning, partner transitions, and strategic decision-making. But maintaining an in-house valuation capability is costly and impractical for most CPA firms.

The result? Missed revenue, delayed client service, or referrals to outside firms that may not understand Puerto Rico's unique business environment.

THE SOLUTION

AXIS Independent Advisory functions as your firm's dedicated valuation arm — without the overhead. We deliver NACVA-compliant business valuations under your guidance, with full bilingual capability (English/Spanish) and deep familiarity with Puerto Rico's business landscape.

HOW IT WORKS

1

You Refer

Identify the client need and make the introduction. We handle data collection and engagement logistics.

2

We Deliver

We complete the analysis using our proprietary model and deliver a professional, NACVA-compliant report.

3

You Shine

The deliverable supports your client relationship. You stay informed throughout and maintain the advisory role.

SERVICES & PRICING

Service	Turnaround	Fee Range	Use Cases
Calculation Report	2–3 Weeks	**$1,500–$1,750**	Buy-Sell, Succession, Internal Decision-Making, Early-Stage Negotiations, Recurring Valuations
Comprehensive Valuation	4–6 Weeks	**Starting at $4,000**	M&A Due Diligence, Complex Structures, Generational Transitions

WHY AXIS

✓ **NACVA Certified (CVA)**
Full compliance with professional valuation standards

✓ **Puerto Rico Expertise**
Local industry knowledge, market dynamics, and cultural context

✓ **Bilingual EN/ES**
Reports, presentations, and communications in English or Spanish

✓ **Fixed-Fee Pricing**
Know the cost upfront. No hourly surprises, no scope creep.