

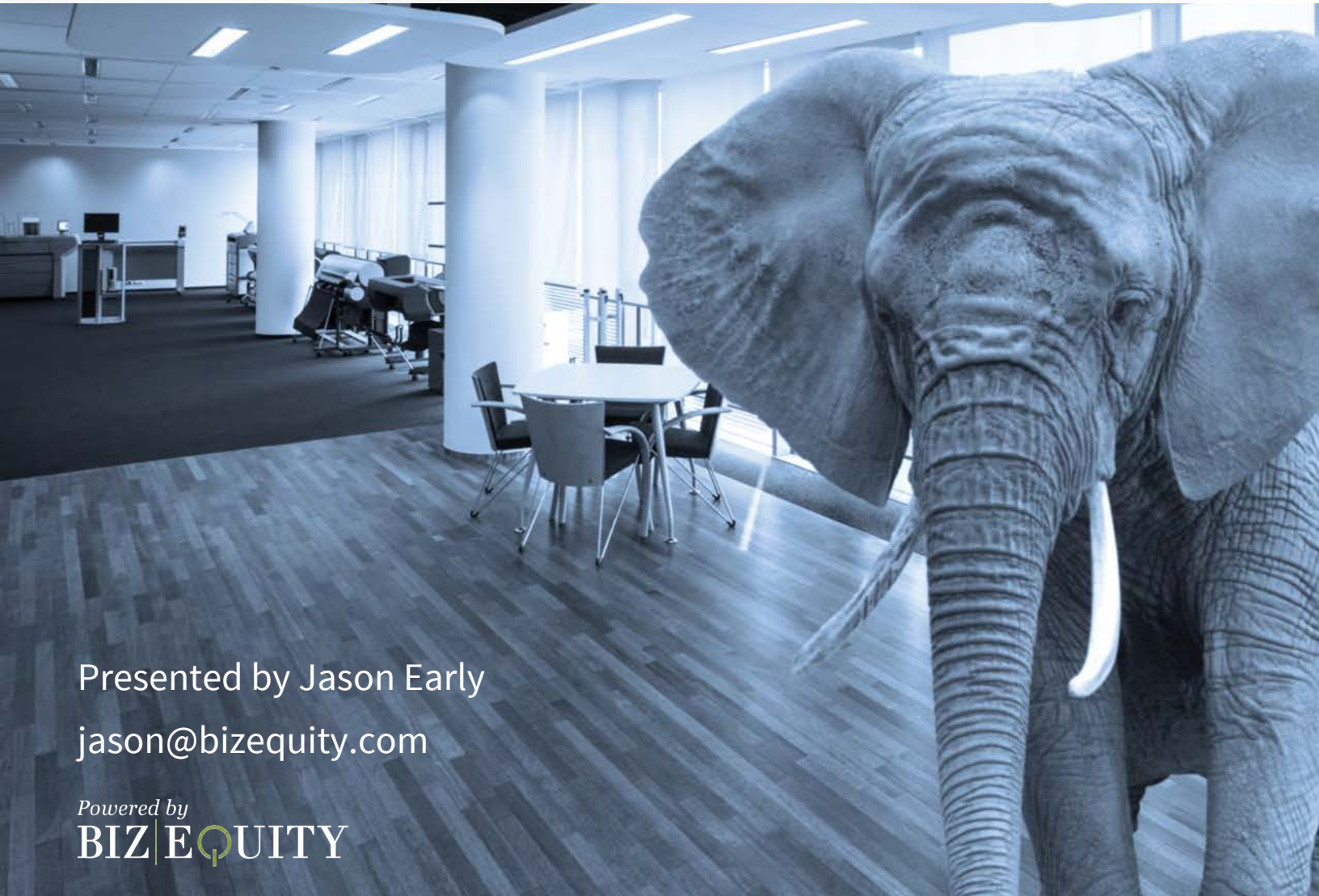
# Insurance Value Report

The New Standard For Business Insurance Needs

Vertex Inc.  
123 main street  
wayne, Pennsylvania

Presented by Jason Early  
[jason@bizequity.com](mailto:jason@bizequity.com)

Powered by  
**BIZ|EQUITY**



# Insurance Value Report

The Insurance Value Report is a feature from BizEquity to help ensure business owners are properly protected. In creating this new report and online service, BizEquity seeks to help advisors understand their prospects' needs prior to the underwriting process. It is part of our mission to democratize Big Data for Small Businesses anywhere.

BizEquity's patent-pending coverage engine computes these numerical results based upon primary research conducted by our Chief Valuation Officer, advisor office driven research studies, and industry researched best practices.

The coverage engine is industry, size, and geo-location dependent. Specific carrier underwriting analytics and advanced sales and marketing insight should be leveraged during the sales process and are recommended to ensure the right solution is tailored to your clients' needs. The results generated by our coverage engine in our Insurance Value report are meant to serve as a guide during the needs assessment phase of the selling process conducted by the advisor. While our engine is proprietary the results depend upon user-generated inputs during our patented 7 step business valuation process.

Based on your inputs, your company is valued at:

**\$7,274,922**

Companies like this typically have the following coverage:

## BUY/SELL AGREEMENT

**\$6,156,397**



A buy-sell agreement is a legally binding agreement between co-owners of a business that governs the situation if a co-owner dies or is otherwise forced to leave the business, or chooses to leave the business.

## KEY PERSON

**\$7,253,097**



Key person insurance is life insurance on a key person in a business. For example, the owner, partners, founders, or key employees. These are the people who are crucial to a business - ones whose absence would be detrimental to the company.

# Insurance Value Report

## UMBRELLA

**\$6,159,835**



An umbrella insurance policy provides additional liability coverage above the limits of your other insurance policies. It is designed to help protect you, your assets, and your business from major claims and lawsuits.

## GENERAL LIABILITY

**\$5,483,331**



General liability insurance protects your business from another person or business's claims of bodily or personal injury, associated medical costs and damage to property.

## DIRECTORS & OFFICERS

**\$7,143,973**



Directors & officers insurance is liability insurance payable to the directors and officers of a company in the event they suffer losses from legal action for alleged wrongful acts in their job capacity as a director and officer.

## WORKERS COMPENSATION

**\$3,361,014**



Workers compensation insurance provides wage replacement and medical benefits to employees injured in the course of employment in exchange for relinquishment of the employee's right to sue his or her employer for negligence.

## DATA SECURITY

**\$5,032,561**



Data security insurance provides additional liability coverage needed as a result of data loss or theft. Coverage can help with response related expenses, including costs to notify impacted individuals. It also helps cover legal fees and liability expenses if your business is sued due to a data breach.

## PROPERTY & CASUALTY

**\$1,452,174**



Property and casualty insurance provides protection against risks of your business' property, such as fire, theft, or weather damage. It also provides protection against legal liability that may result from accidents, injury, or damage to the property of others.



Powered by  
**BIZ|EQUITY**