
STONEBRIDGE

TERMS & CONDITIONS

At Stonebridge Advisory we aim to be upfront, transparent, and fair. We utilize a simple and straightforward “Terms and Conditions Agreement” to assure this transparency and fairness.

By purchasing a Stonebridge Advisory Business Valuation, you agree to the following terms and conditions.

1. To maintain integrity Stonebridge Advisory must complete the valuation independently and in a manner that we deem in compliance with the IRS and to follow the strict standards of a qualified business appraisal.
2. In the situation where Stonebridge Advisory is given incorrect financial information or is asked to revise the valuation due to an error in the information supplied by the client, Stonebridge Advisory must charge a revision fee of \$250.00 in the case of a Standard or Select Valuation. Revisions on Premium Valuations will require a custom quote. **Our goal is to keep the costs low for our clients. We do this by being efficient in our processes, however revisions often slow us down and require us to run the valuation a second time and for that reason we must charge a revision fee.**
 - a. A revision must be requested within 90 days from the original date of completion. The revised report will have the same historical dates as the original report.
3. If for some reason the client no longer has an immediate need for a business valuation, we will hold a credit indefinitely. When the client is once again ready for the business valuation their previous purchase will be honored.
4. Stonebridge Advisory will only work with our client as listed on the business valuation report, unless our client has otherwise stated that we can share information with another entity. Our client’s privacy is and must be a top priority.