

Capitaliz Closes Funding Round to Enhance Product and Further Expand Offering to Europe, Americas

ESG Now Additional Key Area of Valuation Framework for Exit Planning and Valuation Software Platform

DENVER, CO, USA , August 3, 2023 /EINPresswire.com/ -- [Capitaliz](#), a leading digital platform for

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Eric Boone, Madison Marcus

exit planners to deliver scalable business valuation, succession, and exit planning outcomes, today announced an undisclosed round of funding and enhancements to its valuation methodology. Madison Marcus, a top law firm in Australia, led the round.

Eric Boone, lead partner of the Banking & Finance division and the ESG & Sustainability division for Madison Marcus, will join Capitaliz's board. Madison Marcus has also licensed its ESG data to Capitaliz, allowing Capitaliz to

repurpose Madison Marcus' corporate ESG frameworks into its existing valuation framework for mid-market businesses.

Capitaliz's insights and valuation tools allow business owners to identify current business valuation and key actions to accelerate business value. Its proprietary business insights calculations already reflect a comprehensive overview of business value in six specific areas, which facilitate accurate comparisons across industries and highlight areas in need of further development or improvement. This partnership has allowed ESG to become the seventh area.

“ESG factors should not be ignored. [A myriad of studies](#) illustrate that companies with strong ESG performance may be better positioned to attract and retain customers, employees, and investors,” said Craig West, Founder and Chairman of Capitaliz. “Madison Marcus—and Eric, in particular—are the subject matter experts when it comes to ESG at the corporate level and we are thrilled to welcome Eric to our board. We know our partnership will be greatly impactful to mid-market businesses around the world.”

With legal experience, admission, and education in both the States and Australia, Boone has spent more than two decades as a leading corporate finance lawyer in global financial capitals,

including New York City. He has advised the Green Climate Fund formed by the 194 governments party to the UN Framework Convention on Climate Change and effectively steered multinationals and large corporations through the increasingly regulated ESG landscape. Boone has also led initiatives focused on social sustainability and diversity, equity, and inclusion with some of the largest and most revered NGOs internationally as well as served as a board member, executive committee member and chair of the International Affairs Committee of the NAACP.

“By integrating ESG considerations into its comprehensive valuation methodology, Capitaliz is sending a clear message to all businesses, irrespective of size or industry, that ESG factors play a significant role in determining overall value,” commented Boone. “I look forward to collaborating with Capitaliz and adding value as the company continues its growth outside of Australia in Europe and the Americas.”

The funding round will support Capitaliz’s product enhancement and further expansion into Europe and the Americas. Capitaliz is already used by dozens of advisors in North America and endorsed by several exit planning organizations including [Legacy Advisors Network \(LAN\)](#), a professional community of advisors dedicated to guiding owners of private and family businesses through succession and transition.

"Capitaliz is a leading tool in our industry designed to identify, protect, maximize and extract the \$10 trillion tied up in privately owned businesses worldwide. At LAN, we believe Capitaliz is a game-changer for our advisors seeking to successfully engage more clients through powerful business insights and scale their business operations through proven process productivity and efficiency gains. The platform enables you to work collaboratively with clients and stakeholders in delivering scalable business valuation, succession, and exit planning outcomes—using data, not guesswork," said CEO of LAN, Mark J. Dorman.

The Capitaliz platform leverages the 21-step process which has been used for more than a decade with business owners to identify, protect, accelerate, unlock, and manage value in privately owned businesses. Capitaliz enables advisors to work collaboratively with clients and multiple stakeholders such as accountants, wealth managers, attorneys and assign tasks internally and externally including client communication hub to ask questions and gather documentation.

ABOUT CAPITALIZ

Capitaliz is a leading digital platform for exit planners to deliver scalable business valuation, succession, and exit planning outcomes. Created by exit and succession planning veterans, Capitaliz is built with the understanding of exit strategies and proven methodologies to accelerate business value and improve outcomes for private business owners. Succession planning guidance and insights for mid-market clients are paired with collaborative tools, automated recommendations, and administrative functions to help businesses maximize value and manage risk. Capitaliz is headquartered out of Sydney, Australia and works with advisors

throughout Australia, the UK, and North America. For more information, visit www.capitaliz.com.

ABOUT MADISON MARCUS

Madison Marcus is an award-winning, multi-disciplined law firm committed to delivering first-class legal and business services to our clients in Australia and New Zealand. We proudly represent major companies, industry groups and organisations on matters of importance to business and financial activities, successfully bridging the gap between business issues and the law. We have offices in Sydney, Parramatta, Brisbane and Parramatta and strong affiliate offices throughout Australia and New Zealand. This footprint together with access to over 340 full-time staff makes us ideally placed to support clients whose business extends across Australia and New Zealand. For more information, please visit <https://www.madisonmarcus.com.au/>.

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