

# BizEquity and Capitaliz Form Strategic Alliance to Help Support Advisors Who Serve Business Owners to Exit Successfully

PHILADELPHIA , PA, UNITED STATES, October 18, 2023 /EINPresswire.com/ -- Valuation Fintech Leader, [BizEquity](#), is thrilled to announce a strategic partnership with [Capitaliz](#), a leading digital collaboration platform for advisors to deliver business insights, value acceleration, and exit planning outcomes. This partnership marks a significant milestone in the quest to empower

private and small business advisors with the tools and insights they need to thrive in today's dynamic economic landscape.

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*Michael Carter, Founder & CEO of BizEquity*

Privately owned businesses are the backbone of economies worldwide, but they often face challenges when it comes to understanding their financial health and making informed decisions. The BizEquity-Capitaliz partnership aims to bridge this gap by combining BizEquity's cutting-edge business valuation technology with Capitaliz's user-friendly insight reporting and value

acceleration roadmap.

Key benefits of this partnership include:

1. **Comprehensive Business Valuation:** Small business advisors can access BizEquity's powerful business valuation tool through the Capitaliz platform, enabling them to understand the true value of their business in real-time.
2. **Financial Planning and Analysis:** Capitaliz users will have access to detailed financial insights, including cash flow forecasts, budgeting, and financial modeling, to help them make informed decisions about their business finances.
3. **Value Potential:** The integrated offer will allow for financial data from BizEquity to be combined with non-financial data from Capitaliz to accurately predict the value potential of their client's business.
4. **Value Acceleration Tools & Collaboration:** BizEquity advisors can access Capitaliz's leading “21-Step Methodology” to identify, protect, accelerate, unlock, and manage value in privately owned businesses. The advisor can “quarter-back” project delivery amongst internal and external stakeholders using Capitaliz's in-built communication and workflow functionality.
5. **Ease of Use:** The user-friendly interface of Capitaliz, combined with BizEquity's seamless

integration, makes it easy for small business owners, accountants, and financial advisors to leverage these tools without extensive training

Promotional incentives and joint training (webinars) will be offered to all BizEquity and Capitaliz clients to ensure advisors can fully leverage this new partnership, with the first event on October 25th at 3:00 pm EST. To register, visit <http://bit.ly/CapitalizBizEquity>.

Michael Carter, Founder & CEO of BizEquity, expressed his excitement about the partnership, stating, "Our collaboration with Capitaliz aligns perfectly with our mission to democratize business valuation and financial insights. We believe that every business owner, regardless of size, should have access to the tools and knowledge necessary to make informed financial decisions."

Craig West, Founder & Executive Chairman of Capitaliz, added, "We are excited to work with BizEquity to provide small business advisors with a comprehensive solution for managing their portfolio of clients. By combining our strengths, we can empower their success."

This partnership promises to revolutionize the way small businesses approach financial management and valuation. It brings together two industry leaders, BizEquity and Capitaliz, in a shared commitment to supporting the growth and prosperity of small businesses everywhere. For more information about this partnership and the services offered by BizEquity and Capitaliz, please visit <https://www.capitaliz.com/> or <https://www.bizequity.com/>.

#### About BizEquity

BizEquity is the leading fintech software company created to democratize business valuation knowledge for every business in the world. BizEquity has created the largest online business valuation cloud-based software product and service and the most business valuation data on businesses in the market today. BizEquity's patented platform is distributed through leading financial services firms such as TD Bank; UBS; PNC; Northwestern Mutual; Equitable; Goldman Sachs, and over 750 other financial services firms and over 4,000 advisors. BizEquity was acquired by ACBJ in 2019 and now is able to provide financial services firms support to better reach business owner clients to help them discover their worth. Learn more at: <https://www.bizequity.com/>

#### 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 an 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](http://www.capitaliz.com).

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