

### HOW VALUSOURCE RELIES ON ANNUAL STATEMENT STUDIES DATA TO FUEL INDUSTRY-LEADING BUSINESS VALUATIONS

Founded in 1986, ValuSource today provides over 90% of all business valuation software used by thousands of CPAs, valuers, and financial professionals worldwide. For over 30 years, ValuSource has relied on RMA's Annual Statement Studies comparative benchmarking data from over 700 industries to fuel its industry-leading business valuations.

---

#### WHAT'S DRIVING THE USE OF STATEMENT STUDIES DATA IN THE BUSINESS VALUATION COMMUNITY?

Firstly, there is a mandate from organizations like the National Association of Certified Valuers and Analysts (NACVA) that certified valuation experts perform financial statement benchmarking as a part of their practice. Furthermore, these experts must perform valuations across a wide range of industries and instances, including buy-sell, divorce, litigation, IRS, financial planning, and others. With so many different types of businesses and scenarios, valuers need reliable benchmarking data to help them understand what's common for financials in hundreds of unique industries.

VALUSOURCE PROVIDES OVER

90%

of all business valuation software used by thousands of professionals worldwide.

FOR OVER

30  
Years

ValuSource has featured data from RMA's Annual Statement Studies in its products.

STATEMENT STUDIES INCLUDES DATA FROM OVER

700

industries, fueling industry-leading business valuations.

“The integrity and credibility of Statement Studies’ data are unmatched given RMA’s highly documented process for compiling the data coupled with its 100-year history of providing this resource to the financial services industry. I am proud to offer Statement Studies data in our solutions and look forward to working with RMA to provide additional value to our users in the years to come.”

*David Fein, CEO, ValuSource*

## WHERE STATEMENT STUDIES FITS INTO VALUSOURCE'S SOFTWARE

Business valuers are required to compare a subject company to its industry, and Statement Studies data provides the foundation for this comparison. As such, ValuSource has imported all Statement Studies data into its software to support the automation and standardization of the business valuation process.

Here's a step-by-step overview of how a valuator uses ValuSource software and Statement Studies in tandem:

- Step 1: Input company financial statements (potentially normalize statements)
- Step 2: Select the correct Statement Studies year, industry, and data slice
- Step 3: Download the data into the valuation project
- Step 4: Analyze the results of the comparison
- Step 5: Apply results to valuation assumptions
- Step 6: Generate valuation report including Statement Studies narrative and results

Over the years, ValuSource has gradually automated the process of incorporating Statement Studies data into users' valuation projects to ensure greater ease of use and more accurate valuations. Recently, the company added Statement Studies data to its Platinum and Titanium bundles, which made RMA data available to even more ValuSource users.

---

## THE VALUE OF STATEMENT STUDIES DATA FOR VALUSOURCE CUSTOMERS

Just as a large majority of Statement Studies subscribers use the data to make better credit and lending decisions year after year, many ValuSource users have relied on Statement Studies for decades. By making Statement Studies data a core part of its solutions, ValuSource users get a better overall picture of a company's strengths and weaknesses to guide the results of their valuation reports. Furthermore, since Statement Studies data is based on real financial statements instead of theoretical models, ValuSource users can be confident that the benchmarking data they utilize reflects their subject company's situation, no matter the industry.



## Learn More About RMA Annual Statement Studies & ValuSource

[rmahq.org/annual-statement-studies](http://rmahq.org/annual-statement-studies)  
[studies@rmahq.org](mailto:studies@rmahq.org)

[valusource.com](http://valusource.com)  
[sales@valusource.com](mailto:sales@valusource.com)