



## AIA Best Practices: Firm Valuation Resources

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Contributed by AIA Knowledge Resources Staff

### Summary

Valuation is a stressful and important aspect of ownership transfer. Often it is best if the valuation process is led by a third-party consultant and not the firm's accountant. Here is a list of valuation consultants and resources to search through multiple consultants.

### Independent third-party assessment of firm value

#### **National Association of Certified Valuators and Analysts**

5217 South State Street, Suite 400

Salt Lake City, UT 84107

800-677-2009

[www.nacva.com](http://www.nacva.com)

NACVA can provide a list of its members who can value architecture firms in your area.

#### **PSMJ Resources Inc.**

10 Midland Avenue

Newton, MA 02458

617-965-0055

[www.psmj.com](http://www.psmj.com)

PSMJ advises firms on firm valuation and ownership transfer.

#### **Zweig Group**

1717 McKinney Avenue, Suite 757 Dallas, Texas 75202

P.O. Box 1528 Fayetteville, Arkansas 72702

800-466-6275

[www.zweiggroup.com](http://www.zweiggroup.com)

Zweig Group advises firms on firm valuation and ownership transfer.

### **Strogoff Consulting**

305 Miller Avenue Mill Valley, CA 94941

415-383-7011

[www.StrogoffConsulting.com](http://www.StrogoffConsulting.com)

Strogoff Consulting offers independent third-party firm valuations, guides firms through ownership transitions, and operates a Confidential Clearinghouse for mergers and acquisitions.

## Firm valuation and ownership transfer publications

### ***Architect's Essentials of Ownership Transition***

By Peter Piven, FAIA, with William Mandel

Excerpt from the book jacket: "Provides instant access to highly focused, very specific advice on all critical transition phases, including candidate selection, valuation, transfer mechanisms, implementing an ownership transition program, and more. Written by leading experts in the field, it is an indispensable resource for architects, landscape architects, interior designers, and other design professionals planning to participate in an ownership transition."

*The AIA collects and disseminates Best Practices as a service to AIA members without endorsement or recommendation. Appropriate use of the information provided is the responsibility of the reader.*

## About AIA Best Practices

AIA Best Practices is a collection of relevant, experience-based knowledge and expert advice on firm management, project delivery, contracts and more, aligned with the *Architect's Handbook of Professional Practice, 15th edition*. See the full AIA Best Practices collection at [aia.org/aia-best-practices](http://aia.org/aia-best-practices).

This article corresponds to:

*Architect's Handbook of Professional Practice, 15th edition* Unit 1 – The Profession  
Chapter 05 – Organizational Development  
Section 06 – Ownership Transitions