

# **Integrated Reporting**

# **QUIST INSIGHTS™**

## **Business Value Measurement & Growth**

## **CORPORATE OVERVIEW**


- **Quist Valuation – Parent Company**
  - 35+ year old independent business valuation firm
  - Recognized as one of the nation's leading providers of valuation and securities analysis services
  - Completed thousands of valuation projects
- **Quist Insights™ - Introduced 2018**
  - Unique SaaS valuation and business planning software platform

## **QUIST INSIGHTS - IDEATION DRIVERS**

- Traditional valuation services didn't meet needs of business owners
- Desire to understand how actions/investments impact value of business


# MEASURING VALUE – THE KEY DRIVERS

The software asks 65 questions, enabling assessment  
6 key quantitative & qualitative drivers of value

 QUIST Management Insights Surveys

Getting Started


To get started, click on one of the business Value Drivers below. You will be required to complete each of the sections before getting your Results.



Strategic Value

Completed


100% Complete



Organizational Value

Completed


100% Complete



Employee Value

Completed


100% Complete



Customer Value

Completed


100% Complete



Financial Value

Completed


100% Complete



Environmental, Social & Governance

Completed

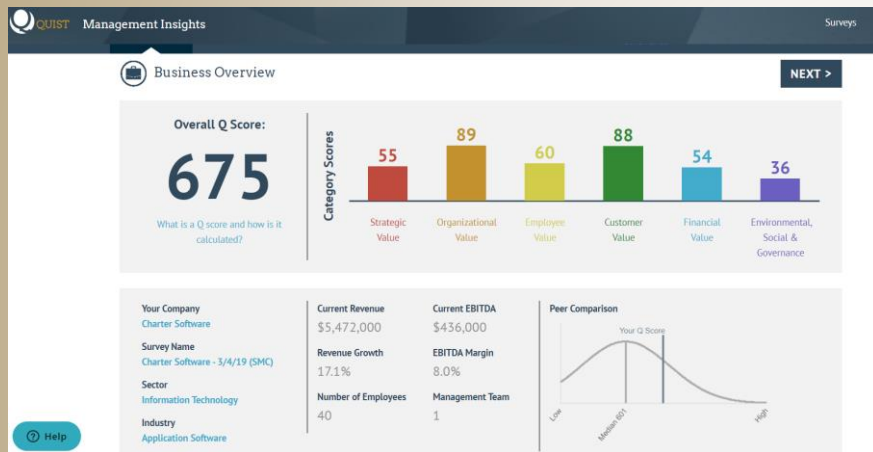
100% Complete

 Help

GET RESULTS

# MAXIMIZING VALUE - EVALUATION OUTPUT

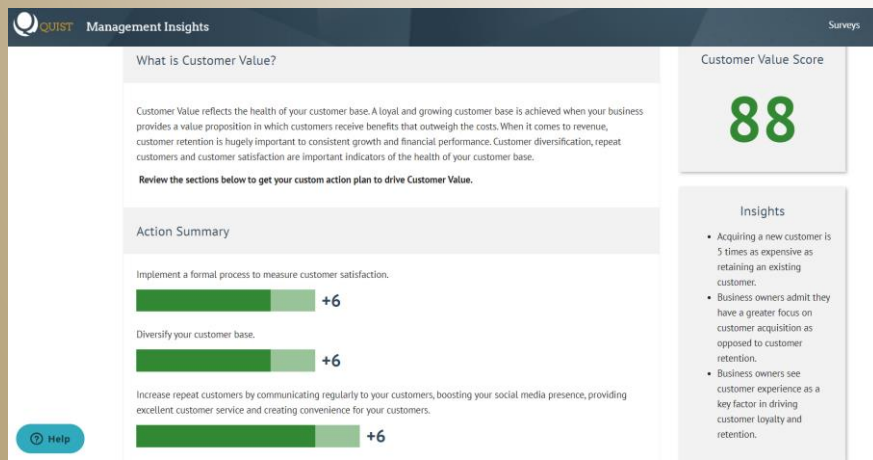
## Scoring of business & key value drivers



## Current & Potential Value, Value Gap



## Actionable recommendations & impact to value



# SHINA CULBERSON, BIO



Shina Culberson, CFA

As the President of Quist, Shina Culberson brings over two decades of financial and valuation experience to her leadership and guidance of the firm. Known for her direct style and laser focus, Ms. Culberson specializes in business and securities valuation engagements for corporate finance, financial reporting and tax purposes.

Prior to joining Quist, Ms. Culberson was an Equity Analyst for Cohen Independent Research Group where she provided security valuation and investment recommendations on public companies in the biotech, high-tech, and entertainment industries. Additionally, she served as a Director at Charles Schwab Investment Management where she managed the International Credit Research Team covering international financial institutions and emerging market Asia and Latin America sovereign investments. The team covered over 50 debt issuers and had oversight responsibility for approximately \$32 billion in portfolio holdings.

Over the course of Ms. Culberson's successful career, she has participated in hundreds of valuation engagements for public and privately held companies in a number of industries including financial services, biotechnology, software, hardware, oil and gas and entertainment.

Ms. Culberson graduated with a bachelor's degree in Economics from Claremont McKenna College, holds the CFA designation and is a member of the Society of Analysts in Denver.

303.643.5737

Culberson@QuistValuation.com