

thoughtful planning. in-depth research.
the perfect balance.



connecting with core.

Who We Are...



core valuation

Core Valuation is a boutique business appraisal and consulting firm based in Chicago. The firm initially established itself as a leader in sophisticated valuation studies surrounding private equity funds and has serviced valuations in over two dozen industries. Our team members bring 20 years of valuation experience to the table and today work with partners from wealth management groups to AmLaw 100 firms.

What We Do Best...

trust & estates

Successful wealth planning requires a thorough understanding about the goals, the holdings, the situation, and the insurance coverages. Our team members have over 20 years of experience working with AmLaw 100 firms and wealth management firms, providing business valuation reports for tax reporting purposes, ensuring these appraisals meet IRS standards for qualified appraisal.



wealth transfer planning.
multigenerational transfers.
charitable donations.
private foundations.
marital deductions.
estate & tax.
carried interest transfers.

litigation support

Breach of contracts, patent infringements, dissenting shareholder disputes; these are just some of the conflicts we face in our businesses. Our team members have assisted both client and counsel by providing a comprehensive array of litigation support services to help make informed choices throughout this process.



lost profits.
damages analyses.
business valuations.
fraudulent conveyance.
dissenting shareholder disputes.

transaction advisory

We understand the different market participants in any given transaction – the strategic and financial buyers, sellers and lenders. We have been trained to listen and understand your needs and concerns. Our scope is tailored to accommodate those needs, focusing on your objectives negotiation and opportunities.

mergers & acquisition valuations.
buy side diligence.
sell side diligence.
divestitures.





It isn't what we say or think that defines us, but what we do.

Depth and Breadth of Our Experience

Accommodations
Alternative asset management (fund of funds)
Bakery & baked goods
Banking & insurance
Cable televisions
Carried interests
Construction and construction management
Electronic trading house
Emerging growth
Food and beverage
Global asset management
Healthy, active and sustainable sectors
Hedge funds (incentive fees)
Incentive fee interests
Information software
Investment firms in management led buyouts, build ups, recapitalizations, restructuring, split outs.
Investment and portfolio securities holdings
Major appliances retailers
Manufacture of paper and paper products
Manufacture of women's apparel
Martial arts clothing and sports accessories
Online retailers
Patent owners and lessors
Paving companies
Private equity management
Private equity and venture capital
Real estate holding companies
Real estate management service
Shipyards
Shopping malls
Sports agents
Summer camps
Tobacco manufacturing firms
Trusts
Utilities
Wine & spirits retail, among others