



Jacob Helwick | jhelwick@adamyvaluation.com

Jacob Helwick is a Manager with Adamy Valuation. He provides clients with valuation and financial advisory services in connection with employee stock ownership plans; financial reporting; estate and gift tax reporting; economic damages; management succession planning; divorce; corporate strategic planning; and other financial transactions across a breadth of industries. His background in valuation and financial advisory services stems from former roles in an Analyst and a Senior Analyst capacity.

Prior to joining Adamy, Jacob worked for a large Michigan-based bank as a Commercial Credit Analyst in a multi-year leadership development program. In this position, he was tasked with assessing credit risk and underwriting loans for real estate, commercial, and industrial purposes. He also previously served as a risk management intern for a well-known, global chemical company, and spent two years living abroad in Tokyo, Japan.

Jacob is a graduate of Grand Valley State University (GVSU) where he received a degree in accounting and finance. He was an active member of the Seidman Investment Portfolio Organization, the Vice President of a competitive club sport, a co-facilitator of a leadership program for first-year and transfer students, and one of ten pre-selected students to manage an equity and fixed income portfolio over the course of his senior year.

Currently, Jacob is pursuing the Accredited Senior Appraiser (ASA) credential. He remains an active participant in the Grand Rapids community, serving as a mentor to students in the Seidman College of Business at GVSU and as co-chair of the Valuation Seminar for the Association for Corporate Growth – Western Michigan Chapter.



Todd McGuire | todd.mcguire@plante.moran.com

Todd is a senior consultant in the valuations group at Plante Moran. Todd has valued numerous closely held businesses and intangible assets for the purpose of management planning, gift and estate tax, healthcare compliance, marital dissolution, financial reporting (ASC Topics 350, 805, and 820), C to S conversion, and purchase and sale advisement. He has completed numerous projects in the healthcare industry for a wide variety of clients including hospitals, ambulatory surgery centers, physician practices, other specialty clinics, independent/assisted living facilities, skilled nursing facilities, and continuing care retirement communities. Todd has also worked in a variety of other industries including distribution, manufacturing, professional services, retail, technology, transportation, and real estate.