



iGlobal Forum

6TH INDEPENDENT SPONSORS SUMMIT

JANUARY 16 & 17, 2018
NEW YORK

KEY TOPICS TO BE COVERED INCLUDE:

- **Innovative approaches in deal sourcing** and generating deal flow in varying market cycles
- **Impending tax reforms by the Trump administration** and its impact on fund governance and regulatory compliance
- Successful methods for independent sponsors to **downsize the risk and cost structure**
- The art of deal negotiations and **developing mutually beneficial partnerships** for successful deals
- Unique differentiation strategies for independent sponsors to **navigate a highly competitive PE landscape**

HEAR FROM THE FOLLOWING PARTICIPATING COMPANIES:

MERIT CAPITAL PARTNERS
TUCKERMAN CAPITAL
CONSUMER GROWTH PARTNERS
AGI PARTNERS LLC
CLARENDON GROUP II
HURON CAPITAL
STONEHENGE PARTNERS
BLACKMORE PARTNERS
PRODOS CAPITAL MANAGEMENT
PILLSMAN PARTNERS

VERIQUEST PRIVATE CAPITAL
BLACKLAND CAPITAL PARTNERS, LLC
CHARTWELL INVESTMENTS
ALDEA CAPITAL PARTNERS
MTN CAPITAL PARTNERS LLC
BASSETT CREEK CAPITAL
ATALAYA CAPITAL MANAGEMENT
BEACONHOUSE CAPITAL MANAGEMENT, LLC
ELM CREEK PARTNERS
BASE EQUITY PARTNERS

CARUTH CAPITAL PARTNERS
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LEADING EXPERTS & SPEAKERS INCLUDE:

KEYNOTES:



Daniel E. Pansing
Managing Director, **MERIT CAPITAL PARTNERS**



Max DeZara
Managing Partner, **AKOYA CAPITAL PARTNERS**



Nicholas S. Russell
Partner, **TUCKERMAN CAPITAL**



Richard Baum
Managing Partner, **CONSUMER GROWTH PARTNERS**



David Acharya
Partner, **AGI PARTNERS LLC**



Mark G. Fornasiero
Managing Partner, **CLARENDON GROUP**



Christopher Sheeren
Partner, **HURON CAPITAL**



Michael Arguelles
Managing Director, **STONEHENGE PARTNERS**



Yelena Edelstein
Deal Partner, **BLACKMORE PARTNERS**



Douglas Song
Managing Partner, **PRODOS CAPITAL MANAGEMENT**



Christopher B. Eichmann
Managing Partner, **PILLSMAN PARTNERS**



Jay Freund
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Ben Schneider
Managing Partner, **BASE EQUITY PARTNERS**



Ben deTar Wilhite
Co-Founder & Partner, **CARUTH CAPITAL PARTNERS**



Jim Hardin
Founder, **VEIL**



David McReynolds
Managing Partner, **FIVE CROWNS CAPITAL, LLC**



Gerson Guzman
Managing Director & CCO,
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Sylvie Gadant
Partner - Transaction Advisory Services,
CITRIN COOPERMAN



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Rob Bauer
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Brett Hickey
Founder & CEO, **STAR MOUNTAIN CAPITAL**



Julia D. Corelli
Partner, **PEPPER HAMILTON LLP**



Mina Pacheco Nazemi
Founder & Managing Partner,
ALDEA CAPITAL PARTNERS



Brad Batten
Partner, **ZWICK PARTNERS**



Saquib Toor
Managing Partner,
BEACONHOUSE CAPITAL MANAGEMENT, LLC



Zubin Avari
General Partner, **CHARTER OAK EQUITY**

iGlobal Forum 6TH INDEPENDENT SPONSORS SUMMIT

JANUARY 16-17, 2018 | NEW YORK

Dear Colleague,

The rise and prominence of independent sponsors have remained strong over the years but the landscape has been rapidly shifting. The regulatory climate remains uncertain due to impending tax reforms by the new administration therefore impacting how deals will be done. Coupled with big banks and funds of funds now doing one-off deals and offering similar flexibility and transparency to investors, independent sponsors now face competition like never before. So what can independent sponsors do to overcome current challenges around deal sourcing, negotiation, compensation and governance? iGlobal Forum's **6th Independent Sponsor Summit (January 16-17, New York)** will bring together over 150 senior level capital providers and IS executives by combining high-level networking and one-to-one meetings, alongside in-depth content, so you can pick up the best strategies from industry experts, make valuable connections, and improve your odds in generating successful deals. The 6th Independent Sponsor Summit is a key platform to meet and network directly with leading industry professionals and decision-makers all under one roof such as: **Independent Sponsors (Fundless Sponsors), Private Equity Firms, Family Offices, Mezzanine Lenders, Hedge Funds, Institutional Investors, HNWIs (High Net Worth Individuals) and M&A Intermediaries/Advisors.**

Kind regards,

iGlobal Forum Team



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Manhattan NYC's high-energy Midtown location puts you at the crossroads of the city's most iconic neighborhood districts- across from Pennsylvania Station and Madison Square Garden. You'll be staying near Chelsea, just steps from Times Square and Fifth Avenue shopping.

To reserve a spot on our rooming list, please contact info@iglobalforum.com.

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AGENDA TUESDAY JANUARY 16, 2018

ONE-ON-ONE NETWORKING: | 9:30 am to 10:15 am SPEED NETWORKING BREAKFAST

Join us for our speed networking series in this exclusive part of the program. Here you will sign up for concise and focused one-on-one meetings between independent sponsors and capital providers will connect and evaluate potential mutual business opportunities and partnerships. We will provide you with information on all of the other participants to allow you to choose the most relevant and focused meetings during this time on site. This part of the program is a unique and focused way to help you establish relevant new contacts and generate fresh business opportunities.

PRE-SUMMIT WORKSHOP A | 10:30 pm to 12:30 pm SO YOU WANT TO BE AN INDEPENDENT SPONSOR? KEY TIPS FOR BUILDING OUT A SUCCESSFUL BUSINESS

- Regulatory developments and what to expect going forward in 2018
- Closing your first transaction: how to make your business stand out
- The importance of relationships with investors
- Successful strategies in deal sourcing



Mark G. Fornasiero
Managing Partner
CLARENDON GROUP

Mark co-founded Clarendon Group in 1998. He has over 25 years' experience as a principal investor, board member, C-level executive, and management consultant focused on the transportation and logistics market space. Mark has sourced six Clarendon investments, and those that have been divested have produced a combined IRR over 35%. Mark conceived RoadLink, an intermodal logistics consolidation vehicle, as Clarendon's first investment and worked with his Clarendon partners to organize and co-found the company in 2000. Following RoadLink's formation, he guided the investment as a RoadLink board member and shareholder representative and served as CFO/SVP Finance & Acquisitions, Secretary/Treasurer and Chief Strategy Officer during his tenure. Over the course of his decade of RoadLink involvement, Mark executed over 25 acquisitions, divestitures, joint ventures and debt/equity financings comprising over \$350 million of transaction value. Before launching Clarendon, Mark was a senior manager in the Transportation Management Consulting Practice of A.T. Kearney, where he led engagements in strategic development, M&A and profit improvement for transportation and private equity clients. Mark received an MBA from Stanford Graduate School of Business where he was named an Arjay Miller Scholar. He received a BS in Operations Research and BA in Economics from Cornell University where he graduated with highest honors.

- Understanding the development of fundraising, and effectively managing it deal-by-deal
- The process and strategies of taking a transaction/closing fee
- Seeking out alternative fee structures with service providers



Douglas Song
Managing Partner
PRODOS CAPITAL MANAGEMENT

Mr. Song has a diverse background with over 25 years in principal investments, investment banking and operational experience. Mr. Song is a Co-Founder and Managing Director of Prodos Capital Management ("PCM"), a merchant bank focused on investments in the lower middle market. Prior to PCM, Mr. Song was the head of investments and corporate finance for Verus International, a boutique merchant banking firm that was co-founded by Citigroup. At Verus, Mr. Song led investments in both private and public companies in the emerging growth and middle market. Prior to Verus, Mr. Song was SVP of Corporate Development at On2 Technologies. At On2, Mr. Song led all aspects of strategic planning, financial analysis, mergers & acquisitions, financings and the capital markets. Prior to joining On2, Song was a Managing Director at Bluestone Capital Partners, where he was a senior banker and a manager in that firm's Corporate Finance Department. At BlueStone, Mr. Song was responsible for the execution of public offerings and private placements as well as merger and acquisition transactions. Mr. Song was a member of BlueStone's Management Committee and Commitment Committee. Previously, he held positions as an investment banker at Smith Barney in the Global Energy and Power Group and Chase Manhattan Bank in the Workout and M&A Groups. During his career as an investment banker, Mr. Song has executed over a billion dollars in public offerings, private placements, cross border mergers and acquisitions, and restructurings transactions. Mr. Song received a B.S. Degree from the School of Management at Boston University.

PRE-SUMMIT WORKSHOP B | 1:45 pm to 3:45 pm DEAL SOURCING SECRETS FOR A SOLID DEAL FLOW

- Sourcing affordable deals in an overcrowded marketplace
- How to effectively negotiate and gain leverage on investment terms
- Avoiding unicorn deals and targeting peripheral opportunities
- Quality over quantity - focus on doing fewer deals, but working each deal harder to drive returns



Richard Baum
Managing Partner
CONSUMER GROWTH PARTNERS

Mr. Baum is the Managing Partner of Consumer Growth Partners (CGP), a private equity investment and advisory firm with an exclusive focus on specialty retail and branded consumer products companies. Prior to founding CGP in 2005, Mr. Baum spent more than fifteen years as a sell-side equity research analyst with Sanford Bernstein, Goldman Sachs and Credit Suisse where he was consistently ranked among the industry leaders in the annual Institutional Investor and Greenwich Associates polls. Mr. Baum led fifteen IPO and Secondary offerings for companies such as Abercrombie & Fitch, Build-A-Bear Workshop, Cabela's, Fila, Gymboree, Life Time Fitness, Talbots, Urban Outfitters, Yankee Candle Company and Zale Corporation.

Mr. Baum serves as Chairman of the Board of Harris Originals, Inc. and as a Board Director for Vera Bradley, Inc. (NASDAQ: VRA). He is also a Board Member of ACG New York and RMS (formerly the Retail Marketing Society.) Mr. Baum earned a BA degree in economics from the University of Michigan where he graduated magna cum laude with Phi Beta Kappa honors and a JD degree from Harvard Law School.

- Identifying which sectors make sense to hunt for deals in right now
- Assessing the pros and cons of raising a fund and what are your options if you want to do a deal without outside equity
- Mastering the process of a quick turnaround



Brad Batten
Partner
ZWICK PARTNERS

AGENDA

WEDNESDAY JANUARY 17, 2018

8:00 am REGISTRATION & NETWORKING BREAKFAST

8:45 am CHAIRPERSON'S WELCOME AND OPENING REMARKS

Claudine M. Cohen, Principal - Transactional Advisory Services,
COHNREZNICK LLP

9:00 am KEYNOTE INTERVIEW: A FUTURE ROADMAP FOR INDEPENDENT SPONSORS: ECONOMICS, TRENDS AND INVESTMENT

- What are the foreseeable challenges for independent sponsors in the current economic landscape?
- How do you keep your skin in the game, once you have brought a deal to a funding source?
- Understanding the waterfall payments in a deal from top to bottom
- How to handle regulatory uncertainty and mitigate your risk
- How do independent sponsors add value
- At what point should the sponsor secure its junior capital
- Bringing an independent sponsor into an opportunity to help with the heavy lifting?



Daniel E. Pansing
Managing Director
MERIT CAPITAL PARTNERS



Max DeZara
Managing Partner
AKOYA CAPITAL PARTNERS

9:45 am RISING PROMINENCE OF THE INDEPENDENT SPONSOR IN A FOGGY MARKET

- Market terms and conditions for independent sponsor deals and how they work with PE firms
- How will tax reforms, asset bubbles and easy money affect investing decisions?
- What added value has IS provided portfolio companies?
- Dealing with increased competition and new players entering the marketplace
- Future of the independent sponsor model: will this deal structure replace the existing traditional private equity model?
- Human capital development: how are IS building the right expertise and people to develop successful organization as they grow

Nicholas S. Russell, Partner, **TUCKERMAN CAPITAL**

Michael Arguelles, Managing Director, **STONEHENGE PARTNERS**

Saqib Toor, Managing Partner, **BEACONHOUSE CAPITAL MANAGEMENT, LLC**

Ben Schneider, Managing Partner, **BASE EQUITY PARTNERS**

Moderator:

Claudine M. Cohen, Principal - Transactional Advisory Services,
COHNREZNICK LLP

10:30 am MORNING NETWORKING BREAK

11:00 am INNOVATIVE APPROACHES TO GENERATING DEAL FLOW IN VARYING MARKET CYCLES

- Go-to-market strategies - what methods are being used to successfully source deals and differentiate yourself in today's uncertain market?
- What sectors offer the best opportunity to do deals? And which should be avoided?
- Getting in front of business owners without using an intermediary - how do independent sponsors secure deals without committed capital?
- Beating the competition: Identifying proprietary deals before funded sponsors and corporate buyers see them in the market
- Taking an industry focus vs. being a generalist - which is the best approach?

Michael Shein, Managing Partner, **CHARTWELL INVESTMENTS**

Rob Bauer, Managing Member, **BASSETT CREEK CAPITAL**

Sachin Sarnobat, Managing Director, **ATALAYA CAPITAL MANAGEMENT**

David McReynolds, Managing Partner, **FIVE CROWNS CAPITAL, LLC**

Julia D. Corelli, Partner, **PEPPER HAMILTON LLP**

11:30 am BEST IN-CLASS STRATEGIES FOR INDEPENDENT SPONSOR DEAL STRUCTURING AND DIFFERENTIATION

- How can independent sponsors successfully downsize the cost and risk structure?
- New strategies for finding value-add opportunities in the market, and differentiating your deals
- Fundraising for your deals before you have a consistent and reliable investment source
- The importance of the operator role in each individual deal

Yelena Edelstein, Deal Partner, **BLACKMORE PARTNERS**

Alex Allgood, Managing Director, **VERIQUEST PRIVATE CAPITAL**

Mina Pacheco Nazemi, Founder & Managing Partner, **ALDEA CAPITAL PARTNERS**

Ben deTar Wilhite, Co-Founder & Partner, **CARUTH CAPITAL PARTNERS**

Moderator:

Sylvie Gadant, Partner - Transaction Advisory Services, **CITRIN COOPERMAN**

12:00 pm DEAL ROOM: INDEPENDENT SPONSOR SHOWCASE

In this new interactive element of the program, Independent Sponsors will get to present their best viable deals to Capital Providers.

Julia D. Corelli, Partner, **PEPPER HAMILTON LLP**

1:10 pm STRUCTURING AN INDEPENDENT SPONSOR PROGRAM

Discuss how to best structure an independent sponsor program and its SPVs to ensure economics that support your firm, reassure target portfolio companies that you have the ability to close, and position you for growth (i.e. leveling the field when competing against or co-investing with PE firms). This ten-minute address will provide insight into structuring and regulatory considerations and impact of the new tax laws.

1:00 pm NETWORKING LUNCH

2:15 pm ROUNDTABLE DISCUSSIONS

These sessions will provide you with a unique opportunity to discuss the most pertinent business trends in the independent sponsor industry with your peers. The sessions are designed to allow you to share your expertise with a small, intimate group of attendees, and directly interact with experts leading the sector. Choose between one of the following sessions:

ROUNDTABLE 1

Emerging Capital Sources And Models For Independent Sponsor Market

- How has the independent sponsor model evolved?
- The availability of capital from non-traditional sources - family offices, fund of funds with co-invest/direct investment mandate targeting IS
- New approaches to various financing solutions for independent sponsors and finding and selecting the right capital provider for each deal structure?
- Future of the independent sponsor model: will this deal structure replace the existing traditional private equity model?

Christopher Sheeren, Partner, **HURON CAPITAL**

Michael Ilagan, Managing Partner, **BLACKLAND CAPITAL PARTNERS, LLC**

ROUNDTABLE 2

Critical Factors For A Successful Exit Strategy

- Discussion on how to design and execute an attractive exit strategy
- Access to more flexible entry and exit timing to optimize market conditions
- Establishing an exit strategy upfront to reduce exit-induced conflicts and saving time and money down the line
- Developing and managing post-acquisition growth and exit strategies for portfolio companies

Christopher B. Eichmann, Managing Partner, **PILLSMAN PARTNERS**
Olivier Trouveroy, Managing Partner, **MTN CAPITAL PARTNERS LLC**

2:45 pm

ROUNDTABLE DISCUSSIONS: PART TWO

ROUNDTABLE 1

Developing Mutually Beneficial Partnerships For Successful Deals

- Discuss the process for building an independent sponsor relationship and finding the right balance between the needs of each party
- Showing skin in the game - investing alongside partner investors and helping management teams enhance the value of the acquisition
- Learn how to approach not just private equity firm GPs, but mezzanine funds, hedge funds, family offices, and wealthy individuals
- Finding the right partner for each deal - which type of capital provider is best suited for each deal structure?

Brett Hickey, Founder & CEO, **STAR MOUNTAIN CAPITAL**
Zach Wooldridge, Co-Founder, **ELM CREEK PARTNERS**
Jim Hardin, Founder, **VEIL**

ROUNDTABLE 2

Getting Fund Governance And Regulatory Compliance Right

- Addressing increased scrutiny and concern from regulators about independent sponsors
- Key things to factor when structuring equity interests for independent sponsors
- Effectively handling regulatory uncertainty and mitigating your risk when structuring deals
- How will impending regulatory developments, such as the SEC's view of broker-dealer compensation, impact the independent sponsor model?

Zubin Avari, General Partner, **CHARTER OAK EQUITY**

Gerson Guzman, Managing Director & CCO, **CORINTHIAN CAPITAL GROUP**

3:15 pm

AFTERNOON NETWORKING BREAK

3:30 pm

BUSINESS BUILDING ONE-ON-ONE NETWORKING MEETINGS

Sector-specific meetings dedicated to developing partnerships unique to your business model. This unique addition to the program will provide you with the opportunity to meet exclusively with those independent sponsors or capital providers specializing in investments in the same sector and market as you are. We will provide you with a full list of participating capital providers and independent sponsors, and offer 90 minutes of free-flowing networking to meet with the most relevant contacts. You will have the chance then to evaluate the potential for future business opportunities and make the most of your time. These meetings will conclude with our cocktail hour to offer additional unstructured networking time with any independent sponsors or capital providers you may not yet have met.

4:30 pm

CHAIRPERSON'S SUMMARY & NETWORKING RECEPTION

LUNCHEON WORKSHOP 1:15 pm to 2:15 pm

DEAL ECONOMICS, CAPITAL SOURCES AND SOURCING TECHNIQUES: ACQUISITION FINANCING FOR INDEPENDENT SPONSORS

- Successful ways to negotiate better independent sponsor economics
- Discussion on deal structures and fees for independent sponsors
- Overcoming pressure on deal economics and finding bargains in a high valuation market
- Focusing on institutional quality deal sourcing, execution and portfolio monitoring
- Understand where capital sources are looking for proprietary deal flow



David Acharya
Partner
AGI PARTNERS LLC

David Acharya is a Partner at AGI Partners LLC, an alternative investment management firm that deploys capital in private equity investments and special situation opportunities from its funds. In 2014, AGI earned ACG NY's Private Equity Firm of the Year and was a Deal of the Year Finalist. Mr. Acharya is a Board Member of Aura XM, Inc., a leading provider of experiential marketing solutions for global clients and a portfolio company of AGI Partners LLC. Prior to his private equity investing career, he spent 10 years as an investment banker in the highly ranked leveraged finance groups of JP Morgan Chase and Toronto Dominion Securities where he advised, structured and raised over \$18 billion of capital for leading financial sponsors, media, telecom, consumer product and other various companies across the globe. He also advised clients on debt tender/consent transactions that affected over \$4 billion in debt. Mr. Acharya is a Board Member of the ACG NY Chapter, the premier association in New York City for middle market deal making professionals. Also, he is a member of the Advisory Board of The Sport Source. Mr. Acharya holds B.S. and M.B.A. degrees, both conferred with honors, from St. John's University.



Jay Freund
Partner
CANAL HOLDINGS

Prior to joining Canal in 2014, Jay's 25-year career has been focused upon the financial transaction sector, including investment banking and principal investing in private equity, mezzanine, and limited partnership commitments. He has worked previously with PNC Erievue Capital (fka National City Equity Partners), Banc One Capital Corporation, and The Ohio Company. Jay's primary role at Canal is to help lead the efforts in originating, evaluating, closing, and managing portfolio company investments. He received a B.S. in economics from Ohio Northern University and his M.B.A. from the Krannert Graduate School of Management at Purdue University.

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