ADVISORY SERVICES

US CAPITAL

STRATEGIC PLANNING, BUSINESS PLAN WRITING, FINANCIAL MODELING, PROFORMA DEVELOPMENT, DUE DILIGENCE SERVICES, VALUATION, ADVISORY, FEASIBILITY STUDIES, AND RESTRUCTURING SERVICES

At US Capital Global Advisors we provide a complete suite of financial advisory services, including strategic planning, business plan writing, financial modeling, proforma development, due diligence services, valuation advisory, feasibility studies, and restructuring services. We pride ourselves on our ability to listen to our clients, understand their needs, and help them develop custom solutions to complex issues.

Our clients range from capital sources (brokers, commercial bankers, commercial real estate investors, family offices, investment bankers, private equity investors, and venture capitalists) and referral sources (such as accountants and attorneys) to private and public companies that are either seeking capital, need to work through complex opportunities, or require consulting services.

DUE DILIGENCE SERVICES

Using our unique Transaction Analysis™, we provide a due diligence punch list report driven by over 300 scored attributes. We serve our clients by applying a proven, analytic, and objective process for identifying the most relevant and high-value attributes of potentially successful enterprises. The Transaction Analysis encompasses a four-phase client-engagement and management process driven by a proprietary predictive and adaptive analysis system known as the TA Score™.

At US Capital Global Advisors, we are skilled at providing a custom Transaction Analysis focused on due diligence, following an in-depth analysis of all relevant due diligence attributes for each application. The resulting report is used to determine the feasibility of funding.

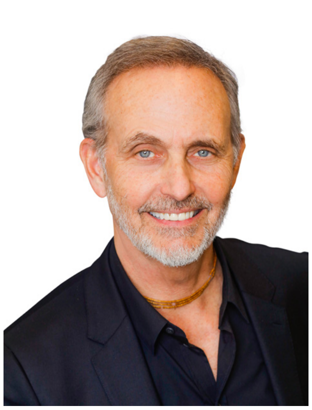
VALUATION ADVISORY

When companies, capital providers, or investors require an independent assessment of a valuation, they look to US Capital Global Advisors to stress test it. We help our clients address some of their most challenging valuation issues, ranging from strategic, transactional, and operational decisions through to compliance and monitoring. Our finance and accounting expertise, combined with the use and development of sophisticated valuation methodologies, can meet even the most exigent valuation needs.

FEASIBILITY STUDIES

We provide high-quality, thorough market and financial feasibility studies. Our customized feasibility services assist our clients in the decision-making process, as they determine how to proceed with a proposed project or venture. Our financial feasibility studies can evaluate the feasibility of new entities, the acquisition of an existing business, the introduction of a new product or business expansion, and much more. We always customize our studies to meet your unique needs.

When developing custom studies, we often address industry standard metrics including, but not limited to: Market Feasibility Studies, Industry Trends, Total Addressable Market (TAM), Serviceable Available Market (SAM), and Serviceable Obtainable Market (SOM). We may also determine Customer Acquisition Costs (CAC) and Key Performance Indicators (KPIs).



Jeffrey Sweeney
Chairman & CEO

Charles Towle
Managing Partner & COO

RESTRUCTURING SERVICES

Our workout and restructuring division understands the intricacies of corporate finance and has extensive practical knowledge and experience in unravelling the complexities of troubled projects and transactions, as well as the skill and innovation to solve problems. We are able to advise either lenders/creditors or borrowers/owners in connection with workouts of a wide variety of financing options, including bridge, permanent, construction, commercial, mezzanine, and asset-based loans. Special situations require tailored solutions to meet the needs of clients facing inflection points, which are initiated by capital structure or other liquidity/financial issues. Our goal is to turn distress into opportunistic scenarios. These services include litigation support and fiduciary advice, when applicable.

In addition, we are able to manage the relationship between the investor/lender and the company through our Management Services Agreements (MSA). The MSA gives clients access to their monthly updated TA Score, document updates as the business evolves, and several hours of Executive Management Team consulting per month. Investors, lenders, and clients have 24/7 access to all material and data through a secured banking standard cloud-based server.