

SELL-SIDE AND BUY-SIDE SERVICES, STRATEGIC ADVISORY, M&A FINANCE

US Capital Global provides sell-side, buy-side, and divestiture financing and advisory for mergers and acquisitions (M&A), specifically for the emerging growth and middle market arena (\$50 million to \$1 billion in revenue or enterprise value). Business exit event and acquisition services with financing at the firm are provided by US Capital Global Securities, LLC, a registered broker-dealer and member of FINRA and SIPC. US Capital Global's team of seasoned senior bankers have significant M&A experience in the middle market, having successfully completed numerous transactions in that market across a wide range of industries, with their experience encompassing both domestic and international transactions. The firm offers clients personalized service, creative solutions, and the ability to close transactions quickly and on the best possible terms.



A COMPLETE M&A SOLUTION FROM INCEPTION TO POST-CLOSE LIQUIDITY

At US Capital Global, we have deep sector knowledge in investment banking and corporate finance, with the ability to finance deals swiftly with senior-level banker attention on transactions. For diligence and readiness to launch analysis, we are supported by US Capital Global Partners, our experienced advisory and diligence group, using proprietary FinTech tools and processes for enhanced data analytics. Our Sales and Marketing Division has an extensive network of potential buyers (and sellers for our buy-side clients) to maximize corporate transaction value (and transaction terms) for our clients, coupled with all the benefits of a tried-and-tested digital marketing infrastructure. We can also provide the debt and equity needed for our buy-side clients to effect their purchase transactions. Upon sell-side post-close liquidity, our experienced Asset Management Division and our Wealth Management Division support our clients with tax-efficient structures and a comprehensive suite of wealth management services.



SELL-SIDE M&A REPRESENTATION

US Capital Global utilizes its wide network of economic, strategic, and private equity buyers to bring clients the highest market valuation.

The firm has experience with a wide range of sellers, having represented:

- Family-owned and founder-owned companies in obtaining liquidity
- Owners implementing an exit strategy
- Companies obtaining growth capital
- Public companies going private
- Corporations divesting a division or product line
- Shareholders in facilitating management buyouts
- Multinational corporations



BUY-SIDE SERVICES FOR PRIVATE EQUITY GROUPS & CORPORATE DEVELOPMENT

US Capital Global generates deal flow through an in-house team of experienced research professionals focused on meeting the client's specific investment criteria.

US Capital Global buy-side services offer the firm's private equity and corporate acquirers:

- Significant deal flow
- Proactive representation in the "search environment"
- Leverage of large proprietary database
- Financially qualified targets
- Analytical support for business valuation and deal structuring
- Debt and/or equity acquisition funding
- Transaction completion on the best possible terms

EXPERIENCED MANAGEMENT TEAM



Jeffrey Sweeney
Chairman & CEO



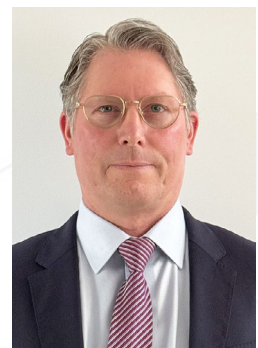
Charles Towle
Managing Partner & COO



Mitchell R. Cohen, Esq.
Senior Vice President
and Partner



Frank Villarreal
Managing Director and
Partner



David Reinikainen
Vice President