

INVESTMENT BANKING

& CORPORATE FINANCE
ADVISORY SERVICES

We are more than investment bankers.

We invest heavily in the resources and talents of our firm, so our clients can be confident they have the best in the business working on their behalf.

Focused on the middle-market, we pride ourselves on our ability to optimize the value returned to our clients. At Sikich, we offer the following comprehensive investment banking services:

ACQUISITIONS ADVISORY

Devoting sufficient resources to running a business while conducting an exhaustive and effective search for appropriate opportunities is challenging. Focus on your core business, while we handle the rest – and we'll bring you in only when the time is right. At Sikich, we provide our clients with:

- Personalized, targeted outreach campaigns
- Improved access to non-public data
- Identity discretion to reduce competitive risk
- Optimized valuation by identifying exclusive opportunities rather than auctions

CAPITAL RAISES

Growing a business requires capital resources. Explore the "financeability" of your contemplated growth path, whether that plan involves organic or acquisition-oriented strategies. The Sikich team provides independent, expert capital markets assistance for private placements of debt and equity, including PIPEs and credit package negotiations. We help business owners and management teams:

- Develop a strategic approach to the capital markets
- Be heard among a flood of requests for limited capital
- Benchmark a lender's proposal against prevailing market conditions
- Design customized financing structures to help fulfill growth strategies at acceptable levels of risk

SALES ADVISORY

The decision to sell a company involves a series of complex considerations, and no two situations are alike. Effectively market and cultivate interest for your business with Sikich's support. We distinguish ourselves in our ability to:

- Implement a disciplined, thoughtful process to maximize transaction value
- Offer thorough, compelling materials that connect all the dots for each potential acquirer
- Manage sensitive matters and maintain critical relationships with vendors, customers and employees
- Prepare meticulously for due diligence

STRATEGIC ADVISORY

When advice is needed, it is needed now.

We regularly conduct rapid assessments of financing, acquisition or divestiture prospects as a precursor to a formal engagement and also:

- Assess options for growth and liquidity
- Analyze and value investment opportunities
- Increase transparency and provide validation for stakeholders
- Monitor a portfolio of investments with "scorecarding" analytics

We identify and analyze a variety of strategic alternatives, including mergers and acquisitions, divestitures and capital formation and measure how each strategy impacts shareholder objectives relative to a range of complex variables.

OUR EXPERTS



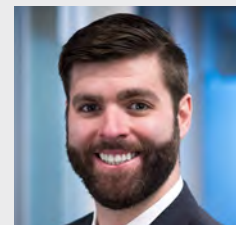
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INVESTMENT BANKING

We have been on the other side of the table. We understand the costs and drivers involved in completing transactions.

While we employ classic investment banking experience and technique, we have also been trained to think strategically and practically - from the perspective of our clients.

 <p>has been acquired by</p>  <p>Exclusive sell-side advisor</p>	 <p>has been acquired by</p>  <p>Exclusive sell-side advisor</p>	 <p>has been acquired by</p>  <p>Exclusive sell-side advisor</p>
 <p>has been acquired by</p>  <p>Exclusive sell-side advisor</p>	 <p>has sold its dehumidification division to</p>  <p>Exclusive sell-side advisor</p>	 <p>has acquired certain assets of</p>  <p>Exclusive buy-side advisor</p>
 <p>has acquired certain assets of</p>  <p>Exclusive buy-side advisor</p>	 <p>has secured a</p> <p>Sr. Revolving Line of Credit Sr. Term Loan Subordinated Debt</p> <p>Exclusive financial advisor</p>	 <p>has completed a Recapitalization provided by</p> <p>LMW2 Partners</p> <p>Exclusive financial advisor</p>

For more information about our services, visit www.sikich.com/investment-banking.

WHAT OUR CLIENTS SAY

"Sikich professionals provided key strategic advice to Zave Networks far in advance of the sale of Google, Inc. that allowed us to position ourselves for maximum value. This strategic insight ultimately resulted in the ability for Zave to generate interest from multiple Fortune 100 companies and increased the valuation of our company substantially."

- **THAD LANGFORD,**
FORMER CEO, ZAVE NETWORKS

"We would not have been able to complete the transaction to purchase certain assets with BP North America without Sikich advising us. Their team has the experience, skills and ability to complete an acquisition with a company the size of BP. Having Sikich as our advisor is what ultimately made the difference."

- **PETE MANCINI,**
PRESIDENT, PARENT PETROLEUM

*Securities are offered through Sikich Corporate Finance LLC, a registered broker/dealer with the Securities and Exchange Commission and a member of FINRA and SIPC.

