

LEADERS OF INFLUENCE:

Private Equity Investors & Advisors



REGARDLESS OF WHAT IS HAPPENING IN THE WORLD AROUND YOU, THE RIGHT PRIVATE EQUITY INVESTOR OR ADVISOR brings a particularly helpful set of skills to the table – and certainly plays a role beyond providing the pathway to an infusion of cash for your business. He or she – and the institution they represent – can genuinely prepare your organization (with the right resources, capital and guidance) for the next level of growth and beyond. Having the right private equity advisor or investor in your corner can make the difference on your company’s path to success or otherwise.

There are some truly outstanding professionals making up the Los Angeles private equity lending and advising landscape. We’ve listed some of the very best of them here, along with some basic information about their careers, practice and some relevant projects they’ve been involved with.

Letter from the Publisher



With the unique and uncharted scenarios that we have faced so far in 2020, growing businesses in the market for private equity have had to face a whole new landscape. The economic climate has forced companies to make changes to the way they do business and to the way they approach their fiscal needs.

The role that private equity investors and advisors play in terms of our financial landscape overall has perhaps never been more important.

Los Angeles is an area that is fortunate in its abundance of leaders of influence who make a significant impact in the private equity space.

For this issue, we've reviewed the careers of many of the most notable private equity related professionals in the region and have selected some of the very best of them to be showcased here. Divided into two alphabetically listed groups (Private Equity Investors and Private Equity Advisors), you'll find some of Los Angeles' leading experts on the subject, along with some basic information about their careers and specialties.

Congratulations to each of the superb professionals who made this list and thank you for your contributions to the local business community's success.

Best regards,

Josh Schimmels
Publisher & CEO



JONATHAN ZUCKER

Managing Director | Head of Capital Markets

jzucker@intrepidib.com

It is with great enthusiasm and pride that Intrepid congratulates Jonathan Zucker for his many contributions in helping to build our Capital Markets advisory group. He is a dedicated leader in advising entrepreneurs and CEOs on raising institutional capital, one of the most important catalysts in the business owner's journey to growth and liquidity. We salute him on being named one of the "Leaders of Influence" by the *Los Angeles Business Journal*.

LEADERS OF INFLUENCE: PRIVATE EQUITY INVESTORS



MARK ATTANASIO

*Co-Founder and Managing Partner
Crescent Capital Group*

Mark Attanasio is the co-founder and managing partner of Crescent Capital Group LP and chairman and principal owner of the Milwaukee Brewers. Founded in 1991, Crescent is an employee-owned alternative asset manager and SEC-registered investment advisor with approximately \$26 billion in assets under management and over 170 employees. Attanasio holds positions on several not-for-profit boards, including Heal the Bay, the Los Angeles County Museum of Art (LACMA), and Harvard-Westlake School. In addition, Attanasio served on the President's Leadership Council at Brown University for a decade and is currently a member of Major League Baseball's Executive Council, Labor Policy Committee and is Chairman of the Investment Committee. He received an A.B. from Brown University and a J.D. from Columbia University School of Law.



GAVIN BATES

*Managing Director
Caltius Structured Capital*

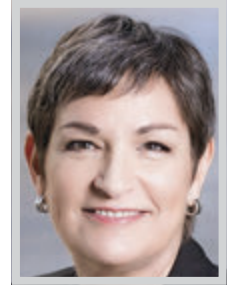
Gavin Bates actively originates, structures and negotiates new investment opportunities and maintains client relationships. He is a key contributor to his firm's growth initiatives, including fundraising, marketing and business development. Bates joined Caltius Structured Capital in 2008. Previously, he was a director at CapitalSource, responsible for sourcing and underwriting cash flow-based senior and subordinated debt transactions for equity sponsors. Prior to CapitalSource, he worked for London, England-based private equity funds Compass Partners and Permira, where he originated, executed and managed private equity investments. Bates started his career with HSBC Investment Bank. Bates has a great ability of identifying investment opportunities for the firm, however he is also a true advisor for companies. Bates and his team evaluate the management and the business to play a pivotal role in helping companies execute their corporate goals and objectives.



KEN FIRTEL

*Managing Partner
Transom Capital Group*

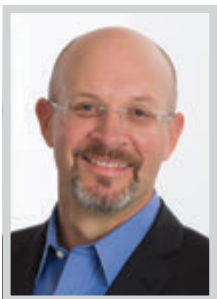
Ken Firtel is a managing partner of Transom Capital Group, an operations-focused private equity firm in the middle market. At Transom Capital, Firtel is a member of the Investment Committee and sits on the board of Transom Capital's portfolio companies. Firtel is a key decision maker in all-important firm decisions, including, without limitation, crafting the firm's strategy across sourcing and execution. Over the past 24 months, with Firtel's involvement, Transom Capital has completed five platform acquisitions as well as various add-on acquisitions to its existing portfolio. Firtel was deeply involved in the sourcing and execution of these transactions. Prior to Transom Capital, Firtel was an investment professional at Platinum Equity and before joining Platinum Equity, Firtel was an associate in the Transactions Department of O'Melveny & Myers. Firtel is also a leader in the broader community, serving on the board of Angel City Sports.



JERI HARMAN

*Founder and Chairwoman
Avante Capital Partners*

Jeri Harman joined the board of NN Inc., a diversified industrials company, last year. She was named one of the most influential women in mid-market M&A by Mergers and Acquisitions magazine in 2020, a designation she has received every year since 2016. Avante Capital Partners has invested more than \$400 million in lower middle-market businesses across the U.S. to date. Harman's company makes debt and equity investments of \$5 million to \$25 million to lower middle-market businesses to finance buyouts, minority recaps, acquisitions and growth. She has more than 30 years of financing and M&A experience. Prior to Avante, Harman founded and led the Los Angeles offices for American Capital Ltd. and Allied Capital Inc. She also co-chairs the Association for Corporate Growth's Los Angeles Business Conference and is a member of the Private Equity Women Investor Network's Steering Committee.



JEREMY HOLLAND

*Managing Partner, Origination
The Riverside Company*

Jeremy Holland is a managing partner at The Riverside Company, leading the Origination team across the various funds/strategies. Holland joined Riverside in 2010, when the firm recruited him to switch from executing deals to focusing on originating new investment opportunities in the Western U.S. and Canada. He has more than 20 years of private equity experience, closing deals across a range of industries. Holland's influence in the private equity community is heavily derived from his enthusiastic support of other M&A professionals' career paths. He has spent a tremendous amount of time over the years thoughtfully referring deals to people who would not have otherwise seen them, helping people work their way through career advancement and/or pivoting their career in a new direction. In the past 12 months, Holland's team has sourced more than a dozen new investments that deal teams have closed across a broad range of industries.



KEVIN MA

*Co-founder and Managing Partner
Diversis Capital*

Kevin Ma is the co-founder and managing partner of Diversis Capital, a Los Angeles based investment firm that backs owners and founders all over the world. He is the Chairman of the Board of Caligor Coghlan Pharma Services, ArrowStream, PureCars, and WorldAPP and sits on the boards of Tempo, Marketron, and ServicePower. Prior to co-founding Diversis in 2013, Ma held positions in private equity, strategy consulting (BCG), investment, and operational roles. As such, he brings a transaction, due diligence, and operational transformation skill set to his role at Diversis. Diversis focuses on software and tech enabled organizations, investing primarily in companies that generate annual revenue between \$10 million and \$50 million. The firm closed a \$255 million inaugural fund last year, which they plan to use on investing in companies in North America, as well as Europe.



RON NAYOT

*Co-founder and Managing Partner
Diversis Capital*

Ron Nayot is the co-founder and managing partner of Diversis Capital, a Los Angeles based investment firm that backs owners and founders all over the world. He is the Chairman of the Board of ServicePower and Tempo, and sits on the boards of ArrowStream, Caligor Coghlan Pharma Services, Marketron, WorldAPP, and PureCars. Prior to co-founding Diversis in 2013, Nayot spent over a decade in corporate finance and M&A and brings extensive due diligence, negotiations and valuation expertise to the team. Ron previously worked at the Gores Group and American Capital, where he worked on corporate carve-outs, taking businesses private, and on divestitures and bankruptcies ranging in size from \$50 million to \$5 billion. Diversis focuses on software and tech enabled organizations, investing primarily in companies that generate annual revenue between \$10 million and \$50 million. The firm closed a \$255 million inaugural fund last year.

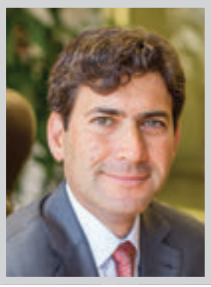


MARK SAMPSON

*Co Founder and Managing Partner
Pacific Growth Investors, LLC*

Mark Sampson has over 30 years of experience in the private equity and banking industry, mostly focused in the middle market and lower middle market and in large part in Los Angeles. Sampson started his career in banking which culminated in managing a west coast credit product portfolio on behalf of Credit Suisse. Sampson has been a private equity investor for the past 20+ years, having been a founder of both Vintage Capital Partners and recently Pacific Growth Investors. During this time, Sampson has completed over 20 investments, has sat on over 10 corporate boards, majority of which were based in Southern California. During his career, he has been involved in the financing of over \$1.0 billion of capital. In 2017 Sampson co founded Pacific Growth Investors, focusing on the lower middle market, which currently has investments in four middle market companies, three of which are located in Southern California.

LEADERS OF INFLUENCE: PRIVATE EQUITY INVESTORS



MARTY SARAF
Managing Partner
 Century Park Capital Partners

Marty Sarafa is one of the founders of Century Park Capital Partners and has been with the firm since its formation in 2000. He is responsible for sourcing, closing, and managing investments structured as leveraged recapitalizations, later stage growth capital, and leveraged buyouts. He is a member of the firm's Investment Committee and currently sits on the boards of Accelalpha and MCCi. Previously, Sarafa was a Managing Director in the Los Angeles offices of Houlihan Lokey Howard & Zakin where he was responsible for managing the firm's private equity investments through Churchill ESOP Capital Partners. During his time with Century Park Capital Partners, Sarafa has overseen the completion of 66 acquisitions, 21 platform acquisitions and 45 add-on acquisitions. Under Sarafa's leadership, Century Park Capital Partners completed two new platform acquisitions in the last 24 months.



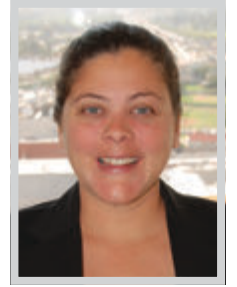
LOREN SCHLACHET
Managing Partner
 The Riverside Company

Loren Schlachet founded and manages the Riverside Micro-Cap Fund (RMCF) family. As fund manager of RMCF, Schlachet leads the fund and has over 25 years of buyout experience. Most notably under Schlachet's leadership, in 2018, Riverside completed fundraising for RMCF V in four months. RMCF V closed at \$1.2 billion in capital commitments with demand exceeding the hard cap by more than 50%. RMCF invests in fast-growing North American companies with generally up to \$10 million of EBITDA. The RMCF team has invested in 68 platforms and 109 add-ons since 2005 and has sold 35 platforms, including Censis Technologies and ProSites in 2019. The Riverside Company is a global private equity firm focused on acquiring and investing in growing businesses valued at up to \$400 million. Since its founding in 1988, Riverside has made more than 650 investments.



PATRICK SHIM
Managing Director
 Mirae Asset Securities & Investments (USA), Inc.

Patrick Y. Shim is a managing director of investments at Mirae Asset Securities & Investments (USA), Inc. Shim focuses on a wide range of private equity and real estate investments, as well as the firm's strategic investment opportunities. Founded in 1997, Mirae Asset Financial Group provides comprehensive investment services to clients worldwide — including asset management, wealth management, investment banking, and life insurance. Today, Mirae Asset has a presence in fourteen countries and the group's managed assets exceed \$400 billion. Shim previously served as senior vice president of corporate strategy and administration at Hana Financial, Inc., a diversified financial services firm. Prior to the position, he served as the firm's strategic business division head. As a member of Hana Financial's senior management, Shim was responsible for the firm's corporate strategy, planning, restructuring, and investments.



IVELISSE RODRIGUEZ SIMON
Managing Partner
 Avante Capital Partners

Ivelisse Rodriguez Simon is a managing partner of Avante Capital Partners. Based in Los Angeles, Simon is responsible for identifying, executing and managing investment opportunities. She currently manages the fund's portfolio and new deal activities. Simon joined Avante in 2009 as a founding member of the firm. Simon has over two decades of middle-market debt and equity investment experience. Prior to Avante, she held positions at Palladium Equity Partners, Reliant Equity Partners and various investment banks including Salomon Brothers. Simon serves on the board of several companies including Quest, LLC. Simon is a longtime advocate and champion for women, minorities and the underserved and underrepresented. She holds leadership roles in several local and national non-profit organizations, including The Robert Toigo Foundation, The Hispanic Scholarship Foundation and Westside Family Health Center in Los Angeles.

Congratulations

to Loren Schlachet
 and Jeremy Holland
 of The Riverside Company and
 all those being recognized by
 Los Angeles Business Journal's
 2020 Leaders of Influence:
 Private Equity Investors & Advisors



www.riversidecompany.com

A Leader of Influence: Private Equity Investors and Advisors

Congratulations to our
 Managing Partner Jonathan Littrell
 for being recognized by
LABJ as a Leader Of Influence

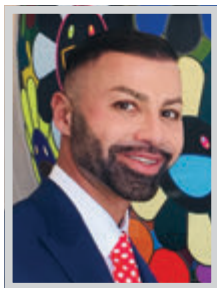


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LEADERS OF INFLUENCE: PRIVATE EQUITY INVESTORS



ALEX SOLTANI

Founder, Chairman & CEO
Skyview Capital, LLC

Alex Soltani founded Skyview Capital in 2005 and is chairman of the firm’s executive and investment committees. He is a serial entrepreneur and started his first business when still a student at UCLA. Soltani brings extensive operational experience to his work in private equity. His strong business acumen and prescient investment instincts have led to successful acquisitions across a number of different industries. Soltani is actively involved with every aspect of the transaction life cycle and plays a significant role in all of Skyview Capital’s investments. Soltani also serves as chairman of the board of directors for all current Skyview Capital portfolio companies. In addition, he has served as chairman of the board of directors of Sourceone Wireless Group, and Collins Enterprise Solutions. Soltani also has served as a member of the board of directors of Fastech Integrated Solutions, PAS Technologies, TRM Copy Centers, and Amvest Financial Group.



JARED STEIN

Co-Founder & Partner
Monogram Capital

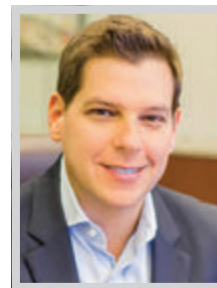
As a co-founder of Monogram Capital, Jared Stein has helped lead the firm since inception nearly seven years ago to become one of the most active investors in the growth consumer landscape. With a strong local presence in Los Angeles including partnering with local brands like Country Archer, Healthy Spot, Koia, Flying Embers, and Vive, Monogram prides itself on being an active partner with its portfolio helping lead initiatives in hiring, marketing, new business development and margin optimization. In the last 18 months, the firm has invested in the fastest growing plant based beverage brand Koia (based in Southern California), the fastest growing emerging brand in yogurt Ellenos, the leading better for you frozen brand Kidfresh and the leading immunity-based beverage brand Vive (also Southern California based).



JEFF WHITE

Partner & SVP
Skyview Capital, LLC

Jeff White has been actively involved with all M&A efforts at Skyview Capital since its inception. He brings decades of experience that encompass private equity, investment banking and executive management. White has held critical positions at many distinguished firms, such as Merrill Lynch and Platinum Equity Holdings. White established and continues to successfully head up Skyview Capital’s business development team. He is responsible for driving growth through acquisitions by identifying, negotiating and assessing all transaction opportunities within the M&A and business development team. White is also a member of the firm’s investment committee. Recently, White expanded his role to working more closely with the firm’s founder to spearhead the firm’s global M&A, strategic alliance and corporate development strategy. In addition to his responsibilities at Skyview Capital, White was the US Chair of the G8 Young Summit, and he served on the membership committee of Milken Institute Young Leaders Circle for six years.



GUY ZACZEPINSKI

Managing Partner
Century Park Capital Partners

Guy Zaczepinski has been with Century Park Capital Partners since 2005. He is responsible for sourcing, evaluating and structuring growth equity and buyout transactions, as well as monitoring portfolio company investments. Zaczepinski currently sits on the boards of Covercraft Industries, Inc. and Dominion Youth Services. Zaczepinski has led five add-on acquisitions for Covercraft Industries, a Century Park portfolio company and a market-leading player in the custom automotive accessory market. Two of these add-on acquisitions closed in 2018. Zaczepinski believes in a flexible and supportive approach in managing the firm’s holdings, providing value-added experience and thoughtful insights into guiding high growth businesses. He adheres to Century Park’s key tenets of integrity, transparency, alignment and respect. Previously, Zaczepinski was with ACI Capital in New York. At ACI, he was involved in sourcing, structuring and executing private equity transactions in the consumer and industrial sectors.

Avant Advisory Group
Uncovering Hidden Value



SECURING VALUE

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Mergers & Acquisitions

LOS ANGELES

NEWPORT BEACH

SALT LAKE CITY

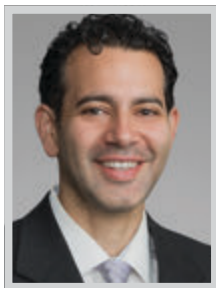
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Avant Advisory Group is a Christian-based firm serving God and our clients with the highest honor and integrity.

LEADERS OF INFLUENCE: PRIVATE EQUITY ADVISORS

**JONATHAN BENLOULOU**

Partner
Kirkland & Ellis LLP

Jonathan Benloulou is a corporate partner in Kirkland's Los Angeles office. He regularly advises private equity firms and private and public companies on merger & acquisition transactions, including leveraged buyouts, joint ventures, minority investments, restructurings and other strategic transactions. In addition, Jon has extensive experience in asset manager M&A transactions. He also counsels clients with respect to corporate governance and other general corporate matters. Benloulou joined Kirkland from Proskauer Rose LLP in March 2019 as part of a 25 person transactional team. He is a nationally recognized M&A attorney receiving numerous accolades during his career. Since 2018, Benloulou has been lead M&A counsel on a variety of transactions totaling over \$10 billion across multiple industries. His clients include Ares Management Corporation, Clarus Ventures, Freeman Spogli, LightBay Capital, Moelis & Company, among others.

**CLAY BRYAN**

Managing Director
FocalPoint Partners, LLC

Clay Bryan is a managing director and head of private equity coverage at FocalPoint Partners, a middle market investment bank headquartered in Los Angeles. Bryan has approximately 20 years of investment banking experience in private equity coverage, debt and equity capital markets, M&A, special situations and both in- and out-of-court restructurings, providing solutions to investors ranging in size from middle market to large cap public company transactions. He has represented clients across a range of industries and has advised entrepreneurs, private equity funds, and other asset managers throughout his career. He has worked at both bulge bracket and boutique investment banks, structuring and executing complex transactions both in the U.S. and internationally. Prior to joining FocalPoint, he was a managing director at Cappello Global and worked in the private equity coverage and M&A groups at Deutsche Bank and Citigroup, respectively.

**DAN CLIVNER**

Managing Partner
Sidley Austin LLP

Dan Clivner is co-leader of Sidley Austin's 330-lawyer Global M&A and Private Equity practice, managing partner of its approximately 140-lawyer Greater Los Angeles offices, where he heads the Corporate department, and a member of the firm's Executive Committee. While leading one of the most prolific M&A and PE practices in the country, he also continues to handle some of the firm's most high-profile transactional matters. His diverse clients include private equity sponsors and companies in the media and entertainment, telecom, technology, financial services and retail industries. In the past few years, he has led several multi-billion dollar private equity deals. Clivner led the 2015 opening of Sidley's Century City office, which has grown to 56 lawyers. His deft management of the new office combined with his success completing more than \$20 billion in transactions has further solidified Sidley's strong position in Southern California.

**JIM DAVIDSON**

Managing Director & President
Avant Advisory Group

James F. Davidson is managing director, president, and founder of Avant Advisory Group, a management consulting and operationally focused financial advisory firm that specializes in middle-market M&A, forensic, fraud, corporate investigations, operational turnarounds and financial restructurings. Davidson and Avant Advisory Group provide M&A transaction support and have performed hundreds of buy-side and sell-side diligence engagements that include financial / quality of earnings and operations for companies ranging from distressed to multi-billion-dollar firms. He and his firm have been engaged by both counsel and buyers/investors to investigate and opine on numerous forensic and fraud examinations, including post-acquisition issues and disputes. Davidson integrates experience from private industry, public accounting, auditing and consulting. His specialties include mergers and acquisitions, distressed and special situations that comprise insolvency, bankruptcy, financial restructurings, and operational turnarounds.

**SUZIE DORAN**

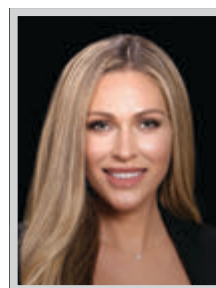
Partner
SingerLewak

Suzie Doran is a distinguished individual with the ability to apply an outside the box business approach. She has helped some of the largest private companies and emerging entrepreneurial clients seize value and opportunity for their respective companies. She has a fundamental commitment and desire for the success of her clients' business goals. She analyzes businesses through a very wide lens with the premise that there's always so much more below the surface. With this wide lens approach, she has helped numerous clients achieve goals they did not see themselves at first. She has helped clients prepare, pivot, scale and create value for their companies and ready themselves for scalability and exponential growth. In the course of her career, and particularly in the past two years, Doran has advised some of the most prevalent entrepreneurial companies in Los Angeles on a sale, acquisition or merger.

**LOYD GREIF**

President & CEO
Greif & Co.

Lloyd Greif is a proven cycle-rider and 40-year veteran of the southern California investment banking wars. During his storied career, his engagement with private equity firms has primarily revolved around selling his entrepreneurially owned and operated clients to them, although on occasion Greif has also represented private equity firms in their acquisitions or divestitures of portfolio companies. Greif's client-first mantra is best epitomized by his uncanny ability to consistently obtain top dollar for his clients from the sale of their equity securities, either in merger & acquisition transactions or corporate financings. Although Greif does deals with private equity firms where appropriate, if a client wants the highest price possible at the closing of a sale transaction, he will typically sell the company to a strategic buyer that can pay more than a PE firm because of the cost-saving or revenue-enhancing synergies stemming from the combination of buyer and seller.

**SHIANNE HOLLANDER**

Producer
Lockton Insurance Brokers, LLC

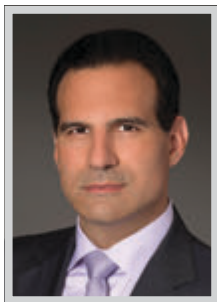
Shianne Hollander is a producer with Lockton Insurance Brokers, LLC, the California subsidiary of Lockton Companies. In her role as producer, she brings over 18 years of experience in insurance and entrepreneurialism to the client relationship. Hollander has the ultimate responsibility to ensure that Lockton delivers on every commitment to her clients. Leveraging various Lockton teams, Hollander leads in creating innovative solutions for property & casualty, management liability, transactional liability and health benefits risks for middle market and Fortune 1000 clients as well as private equity sponsors. She has experience with carve-out transactions and supports clients that span a broad spectrum of the economy. In addition to advising private equity sponsors and management teams, she provides transactional M&A insurance support for deal professionals. Her teams bridge the M&A space, conducting pre-closing insurance due diligence, development of post-closing insurance programs and budgets and post-closing representation of the businesses.

**JEFFREY KAPOR**

Shareholder
Buchalter

Jeffrey H. Kapor is widely considered to be one of the most influential professional service providers to apparel companies. He has been associated with the Southern California apparel industry for more than 35 years, since receiving his J.D. from Southwestern Law School. Kapor currently serves as chair of Buchalter's Apparel Consumer Products and Textiles Practice Group. Kapor focuses his practice on mergers and acquisitions and various corporate matters, with a particular focus and expertise in the apparel industry. He has guided apparel and other consumer clients through their start-ups, capital transactions, mergers and acquisitions, and public offerings. He works closely with investment bankers and financial sponsors structuring creative acquisitions and financing vehicles. Kapor has nurtured companies that started with an idea discussed in his office and gone on to nine-figure IPOs and international renown. He has enabled the completion of sophisticated international transactions, bridging language, cultural and economic barriers.

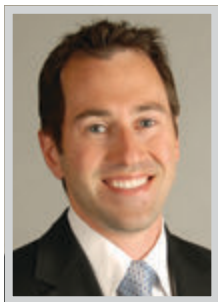
LEADERS OF INFLUENCE: PRIVATE EQUITY ADVISORS



MEHDI KHODADAD

Partner
Sidley Austin LLP

Mehdi Khodadad has always been fascinated by the intersection of law and technology. He was raised in Silicon Valley at the forefront of technology innovation. He tracked market trends, which, beginning in 2006, experienced a seismic shift in the flow of capital to private equity investments in later stage companies in the technology and other innovative sectors. As a result, he nurtured and built relationships, educated himself on the differentiating features of private equity and related best practices, and ventured into his first PE transactions while still an associate at Cooley. In April 2019, Khodadad brought his entire team of partners, counsel and associates to Sidley to scale his practice to new heights, where he and his colleagues have initiated, are in the midst of, or already closed over the past year multiple transactions having an aggregate enterprise value of over \$17.2 billion.



ARI LANIN

Co-Chair, Private Equity Practice Group
Gibson, Dunn & Crutcher LLP

Ari Lanin, co-chair of Gibson Dunn's Private Equity Practice Group, is an active dealmaker for companies that include Aurora Capital, Platinum Equity, The Chernin Group and WndrCo. Companies and private equity firms across a wide range of industries turn to Lanin to guide them in public and private merger transactions, stock and asset sales, joint ventures, and strategic partnerships. Lanin also advises public companies with respect to securities regulation and corporate governance matters, including periodic reporting and disclosure matters, Section 16, Rule 144, insider trading and the implementation of Rule 10b5-1(c) plans. Among Lanin's recent deals was the representation of WndrCo. Since its formation in 2017, Lanin has advised WndrCo in a number of complex long-term investments and acquisitions, including the formation and \$1 billion initial capital raise for Quibi, a new platform focused on mobile, short form content.



JONATHAN D. LITRELL

Managing Partner
Raines Feldman


Jonathan D. Littrell is the managing partner of Raines Feldman LLP. He has significant transactional experience in a broad range of corporate, private equity, venture capital and securities disciplines. His practice includes the representation of public and private entities, fund sponsors, family offices and asset management firms in all aspects of corporate governance and finance including structuring and restructuring, mergers and acquisitions, equity financings, fund formation, joint ventures, private placements and go public transactions. Recently, he represented a management company and two private equity funds in a roll-up and go public transaction creating a \$1.65 billion market capitalization for the resulting enterprise. He has practical experience in all levels of real estate including acquisition, entitlement, relocation, construction and asset management. He has also worked directly with local government agencies including the Los Angeles Housing Department, Community Redevelopment Agency and the Los Angeles City Council.



JON MERRIMAN

Senior Managing Director, Chief Business Officer
B. Riley Financial, Inc.

Jon Merriman serves as senior managing director of investment banking with B. Riley FBR and as Chief Business Officer for B. Riley Financial. Merriman works closely with private equity investors and firms across multiple industry groups to leverage the firm's resources to create solutions for their capital market needs. He specializes in actively advising high growth, small capitalization public and private companies on complex financing and operational issues. With over 30 years of experience in the investment banking, brokerage, and trading businesses, he has deep experience in corporate turnarounds, capital markets transactions and growing organizations across a broad variety of industries, including the healthcare, technology and consumer sectors. He also has experience in managing fast-growing organizations, having grown his broker dealer to over \$100 million in revenues before joining the B. Riley FBR team.



Lockton congratulates

Shianne Hollander

for her recognition as one of the Los Angeles Business Journal's Most Influential Private Equity Advisors

Shianne Hollander

Producer, Vice President
shollander@lockton.com

- Risk Management
- Private Equity
- Property & Casualty
- Employee Benefits

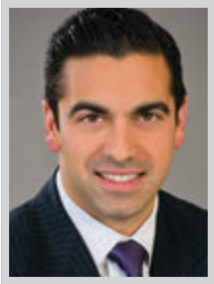
Shianne is a strategic partner who drives innovative solutions for our clients' property & casualty, management liability, risk finance and health benefits challenges.

Collaborating with owners, management, investment bankers and lawyers, she advises private equity sponsors and management teams and provides transactional M&A insurance support including carve-outs, pre-closing insurance due diligence, post-closing insurance programs and budgets as well as post-closing representation of the businesses.



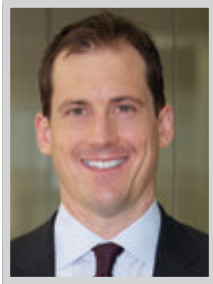
UNCOMMONLY INDEPENDENT

LEADERS OF INFLUENCE: PRIVATE EQUITY ADVISORS



HAMED MESHKI
Partner
Kirkland & Ellis

Hamed Meshki is a Mergers & Acquisitions partner in Kirkland’s Los Angeles office. His practice focuses on highly structured and complex transactions, including mergers & acquisitions, restructurings, recapitalizations and financings. Meshki’s clients have noted that he excels at strategic thinking and is a true partner in their businesses, whose input they value and trust. Accordingly, he is often his clients’ first call for complex transactional solutions, including mergers & acquisitions, but more broadly, equity financings, turnarounds and workouts, growth equity investments and structured financings across the full capital structure. His practice involves the representation of some of LA’s and the world’s most prominent private equity firms and their portfolio companies. Since the onset of the COVID-19 pandemic alone, he has worked with a number of clients to address liquidity needs for their portfolio companies, as well as to make impactful investments in businesses in need of capital injection.



JOEL MONTMINY
President & CEO
Montminy & Co.

In his career, Joel Montminy has personally originated, led and closed nearly \$6 billion of middle market transaction volume, including over \$2 billion in cross-border transactions in over 30 countries. Founding the firm in 2010, Montminy has grown his eponymous firm profitably every year since inception, representing over 150 clients in a wide variety of corporate finance assignments. Today, Montminy & Co. has 24 team members, including 14 registered reps, ranking as one of the largest privately held boutique investment banks in Los Angeles. Montminy leads the firm and spearheads client assignments across the globe, including cross-border and domestic mergers and acquisitions, leveraged and management buyouts, and private placements of equity securities, restructurings, business valuations, fairness opinions and strategic advisory assignments. He is currently leading several high-profile assignments including a \$600 million potential transaction for a New-York based media company.



KELLY O’NEIL
Managing Director
CBIZ MHM

Kelly O’Neil is a managing director at CBIZ MHM, LLC a national accounting and financial services provider, and a shareholder at Mayer Hoffman McCann P.C. (MHM), a national CPA firm that provides audit and attest services. O’Neil’s expertise is providing audit and consulting services to manufacturing, distribution, construction and real estate entities, retail and apparel companies, defense contractors for both public and large privately-held companies, including many backed by private equity and venture capital. O’Neil has a strong understanding of business processes and has been instrumental in developing solutions for corporate management on various accounting matters with significant focus on compliance, operations and internal control environments and the related financial statement impacts. She specializes in revenue recognition, business combination and purchase accounting, accounting for stock-based compensation, equity and debt instruments, derivatives accounting, and general business consulting, enabling her clients to make informed decisions.



ANANT PATEL
Partner
Green Hasson Janks

Anant Patel has over 25 years of public accounting experience and leads both the Green Hasson Janks Consulting Practice and Transaction Advisory Practice and is a member of the Executive Committee for the firm. He advises in the area of mergers and acquisitions and provides financial due diligence consulting such as quality of earnings, working capital analysis, EBITDA analysis and projections and deal structuring. Patel has assisted on deals ranging from \$20 million to \$350 million and is a Certified Merger & Acquisition Advisor (CM&AA). Additionally, GHJ is a member of HLB, the 12th largest accounting network in the world, and Patel is the Global Chair of HLB’s Transaction Advisory Group. He also currently serves as vice chairman of the board of Step Up on Second. Patel also leads the GHJ COVID-19 taskforce; a firm-wide initiative that help assist clients seeking guidance on how to navigate the CARES Act.

Know that **Your Team** is
Here for You

There is a long road ahead to recover from the effects of COVID-19. During these difficult times, our team is here to support our clients and the welfare of their businesses with an array of accounting, tax, and financial advisory services. Our commitment to providing solutions of the highest caliber and value is now stronger than ever. We are here to assist you in planning for the challenges you face and to help you leverage all available opportunities.

Let us know how we can help by reaching out to your engagement team or visiting us at www.cbiz.com/CBIZMHMLA

MHM (Mayer Hoffman McCann P.C.) is an independent CPA firm that provides audit, review and attest services, and works closely with CBIZ, a business consulting, tax and financial services provider.

LEADERS OF INFLUENCE: PRIVATE EQUITY ADVISORS



BRUCE POMPAN

Founder and Managing Director
Clear Capital Advisors

Bruce Pompan is an experienced investment banker with over 25 years in the Los Angeles area advising sell-side and buy-side mergers and acquisitions, and arranging private placements and structuring recapitalizations for middle market companies. He has a broad range of industry expertise, particularly in business services, technology, communications, healthcare services, and media & entertainment. In 2009, after 15 years of advising, leading, and growing the mergers & acquisitions practice at Capello Capital, Pompan founded Clear Capital Advisors. Today, he continues his successful track record of advising entrepreneurs of fast-growing middle market companies, and has sourced, led, and completed four processes in 2019, including the acquisitions of Chem-Aqua and Mr. Rooter, the majority recapitalization of QualityBuilt, and a more than \$100 million raise by Watt Funding for commercial lending. He has built his investment banking practice with a rare transparency and honesty that continues to attract colleagues and leaders of strong companies.



NISHEN RADIA

Co-founder and Managing Partner
FocalPoint Partners, LLC

Nishen Radia is co-founder and managing partner of FocalPoint Partners, a middle market investment bank headquartered in Los Angeles, with branch offices in Chicago, New York, Shanghai, and affiliate partner offices around the world. Since its inception in 2002, FocalPoint has grown to become one of the largest investment banks in the Los Angeles area, with over 55 professionals who deliver a diversified suite of advisory services to clients, including mergers and acquisitions, debt placements, and financial restructurings. Radia has approximately 23 years of investment banking experience advising owners and stakeholders of middle-market companies (typically those with revenues of \$75 to \$500 million) on mergers and acquisitions, debt and equity recapitalizations and financial restructurings. He has served as principal financial advisor on numerous high stakes transactions, notably in the consumer, personal care, and business services sectors, counting a number of household brand names among his roster of clients.



TREVOR SALIBA

Managing Partner
NMS Consulting Inc.

Trevor Saliba is the managing partner of NMS Consulting, Inc., a global management consulting firm where he oversees a global team of over 150 professionals across multiple offices in the United States, Europe, Asia and the Middle East. Saliba works with a handful of global clients that include leading private equity firms, private investment funds and corporate clients where he advises on both the buy and sell side mandate, target identification, due diligence, turnaround and restructuring and structured finance. Most recently Saliba was intricately involved in a client's investment into a leading technology firm that is engaged in the development of a proprietary immersive technology merging virtual reality with music, education and general business back office applications. Saliba's activities also include advising another client on the recent acquisition of a private investment fund focused on venture capital in technology with an emphasis on Europe based companies.



KRISTOPHER SALINGER

Senior Vice President - Investment Banking
Roth Capital

Kris Salinger is a Los Angeles based senior vice president at Roth Capital Partners, one of the country's best-known middle market investment banking and advisory firms. Salinger has close to two decades experience advising corporate and sponsor clients globally on over \$60 billion of issuance across the capital spectrum, having started his career in credit markets at ABN AMRO in Sydney, Australia and then at Citigroup in New York within their Equity Capital Markets team. At Roth Capital, Salinger spearheads the private capital coverage platform assisting companies throughout all stages of their growth cycle on transactions involving minority growth equity, venture debt, levered recapitalizations, pre-IPO crossover placements, and initial public offerings. His recent transaction experience comprises a number of SoCal based companies, including acting as financial advisor to Irvine-based Lunitron Technologies' \$34 million growth equity round in April of 2020.

BRIGHT MINDS
Working creatively and collectively.

LOS ANGELES BUSINESS JOURNAL

NAMES **ANANT PATEL**

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CONGRATULATIONS TO ANANT AND ALL THE WINNERS!



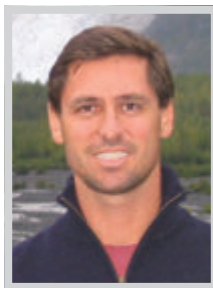
ANANT PATEL
Leader of Advisory and Transaction Advisory Services

LEADERS OF INFLUENCE: PRIVATE EQUITY ADVISORS

**CHRISTINE SHIN**

Partner/ Co-Chair of Corporate Group
Russ August & Kabat

Christine Shin is a Mergers & Acquisitions attorney and Co-Chair of the Corporate Group at Russ, August & Kabat. After graduating Wellsley College and Yale Law School with honors, Shin started her career at Linklaters in Hong Kong and focused her early years as an attorney on advising large private equity firms such as Carlyle, KKR and Blackstone on their investments in Asia. She has built hands-on experience in working together with companies based in India, Russia, South Korea, China, Mongolia, Australia, Taiwan, Singapore, Japan, Philippines, Indonesia and Jakarta and continues to advise clients on both international and domestic transactions within her current practice. After immigrating to Los Angeles in 2014, she has dedicated her professional life to strengthening the private equity community in Los Angeles and making the city a pillar of private equity M&A.

**FABIO SIMI**

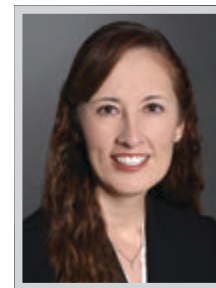
Senior Vice President, Private Equity
and M&A Services
Marsh

Fabio Simi is a senior vice president in the Private Equity and M&A practice of Marsh in Los Angeles. The practice provides private equity firms, corporations and the M&A advisory community with pre-acquisition risk due diligence, reps and warranties insurance, tax insurance, and transactional resources throughout the life cycle of an asset. Marsh's team acts as an external advisor to help manage a portion of the acquisition process to help identify potential risk elements of a deal, lower transaction costs, or help facilitate "stuck deals" where an insurance policy eases the concerns on both sides of a transaction. Prior to joining Marsh, Simi served as a managing director in the Institutional Equity Sales group at Cowen and Company and Lehman Brothers. His other experience includes serving as president at California Peptide Research, Inc. a chemical reagent manufacturing company.

**AARON SOLGANICK**

CEO
Solganick & Company

Aaron Solganick focuses on middle-market software and technology-enabled M&A transactions, which requires a very specific skill set not just of the nuanced M&A process but navigating complex technology matters as well. He has a real presence as a leader in the Los Angeles deal community with the ability to execute and close transactions and a reputation as an elite level advisor to both strategic and private equity clients. He has carved out a reputation of working on complex domestic and international deals that help clients acquire next-generation and fast-growing technology companies. Solganick oversees not only his own book of business but also manages a number of professionals and office staff. He is a natural leader and a respected deal-professional and is thought of in high regard among the private equity ecosystem in Los Angeles.

**ROSE SORENSEN**

Partner
Snell & Wilmer

Rose B. Sorensen is a partner in Snell & Wilmer's Corporate and Securities group, whose practice includes mergers and acquisitions, divestitures, reorganizations, commercial finance, private placements, venture capital, corporate governance, telecommunications services, joint ventures, licensing and entity structure and formation. She has experience handling a range of large-scale mergers and acquisitions, project and corporate financings and restructurings in a variety of industries including the technology, healthcare, food and beverage, manufacturing, retail consumer brand, business services, construction and building materials and aerospace and defense industries. She has represented a variety of domestic and international clients including private developers and equity investors, borrowers, construction contractors, equipment suppliers and a variety of other for-profit and non-profit entities. She has extensive experience counseling foreign-based businesses on the legal issues involved with entering the United States.

It's not the smartest who survive, it's the ones who quickly adapt to change.

Congratulations to Suzie Doran on being selected as a Top Advisor. You Deserve the Recognition!

**Suzie Doran**

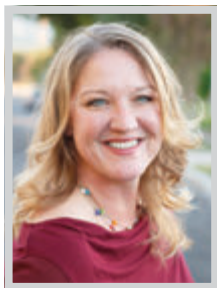
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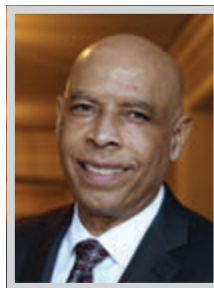
JESSICA STAHELI
Executive Vice President
Scherzer International

As Executive vice president of Scherzer International (SI), Jessica Staheli advises private equity teams on pre-transaction background reports for domestic and cross-border transactions. Staheli has nearly 20 years of experience in background due diligence where she has worked closely with investors and lenders to ensure they get the right information prior to closing the deal. In addition to pre-transaction diligence, Staheli and the team at SI provide post-deal services such as employment reports and M&A diligence for portfolio companies. Headquartered in Los Angeles, SI opened its doors in 1993 and is recognized as a leader in business intelligence, compliance, and concierge-level service for financial services, law firms, and insurance companies. Staheli serves on SI's board of directors and is committed to partnering with clients to ensure that they receive the highest quality of service and information.



CAROL SURUKI-CARMANY
Partner-in-Charge of Los Angeles Office
Moss Adams

Carol Suruki-Carmany is the partner-in-charge of the Moss Adams Los Angeles Office. She has practiced public accounting since 1991, and has significant experience in accounting, auditing, and general business and management consulting, serving multigenerational family-owned and private equity-managed manufacturers, distributors, and other consumer product companies. Suruki-Carmany provides assurance services to middle-market clients that sell products to retail and distribution channels including mass, club, grocery, e-commerce, restaurants, spas, and hotels. Her clients include companies with worldwide international subsidiaries. The California Society of Certified Public Accountants honored Suruki-Carmany with the prestigious Women to Watch Experienced Leader Award in 2010, and she was elected to a board position with the organization in 2011.



GEORGE SWAIN
Founder & CEO
GeorgeSwain Investments

George Swain is the founder and CEO of GeorgeSwain Investments. GSI is an independent global investment bank that assists small and middle-market companies in completing special situation transactions. Swain oversees all investments, investor relations, and operations at GSI. He is a seasoned investment banker with more than 25 years' experience and has advised on more than \$800 million of transactions. Throughout his career, Swain has leveraged his deep industry knowledge to take a strategic approach to deal making rather than chase transactions. The best compliment people say is that he is a visionary strategist. He has a broad range of experience in mergers and acquisitions, debt and equity financing and strategic partnerships. He and the team at GSI believe that greater diversity of investment vehicles and intermediary financial institutions can be developed to bridge the gap between money centers and the full spectrum of entrepreneurs seeking capital.



TANYA VINER
Shareholder
Buchalter

Tanya Viner's practice focuses on mergers and acquisitions, representing both the buyer and seller in large complex transactions ranging from the sale of closely held family businesses to transactions in excess of a billion dollars. In addition to her mergers and acquisitions practice, Viner provides day-to-day counseling on a broad range of transactional and governance matters advising emerging growth companies on formation, venture capital financing, licensing, and employment issues, often acting as outside general counsel, and trusted advisor throughout every aspect of growth. Viner advises clients on matters in nearly every major business sector, including consumer product, apparel and textiles, food and beverage, technology, beauty, financial services, manufacturing, and retail. Currently, she is serving on the Board of The Professional Club and on the Board of the California Fashion Association. Viner's clients appreciate her practical approach in offering both legal and business advice to ensure their goals are met.

CONGRATULATIONS

Tanya Viner & Jeffrey H. Kapor

Leaders of Influence: Private Equity Investors & Advisors

Los Angeles Business Journal
Most Influential Private Equity Investors & Advisors

Tanya Viner
Shareholder

Jeffrey Kapor
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**MATTHEW WRYSINSKI**

Partner and Co-Chair, Finance Group
Alston & Bird

Matthew Wrynski is co-leader of Alston & Bird's Finance Group, the largest transactional practice in the firm, with over 100 attorneys. He also has one of the largest transactional practices, representing private equity funds and their portfolio companies, as well as commercial banks, finance companies, and other commercial lenders in various types of secured and unsecured financings. Wrynski regularly structures financing on behalf of his private equity clients in diverse industries, such as hospitality, manufacturing, media, software, shipping, energy, and seafood. He also participates in deals of all sizes. Wrynski leads transactions that include asset-based credit facilities, acquisition financings, debtor-in-possession financings, debt restructurings, and workouts in single- and multiple-borrower, single-lender, agented, and participated syndication arrangements involving a variety of commercial enterprises. He has been on the forefront of the evolving COVID-19 health crisis, advising clients as they navigate the transforming financial landscape.

**JONATHAN ZUCKER**

Managing Director; Head of Capital Markets
Intrepid Investment Bankers

Jonathan Zucker is a managing director and Head of the Capital Markets Group at Intrepid Investment Bankers. He joined Intrepid in May of 2014 to establish and lead Intrepid's Capital Markets Group. With Intrepid, Jonathan has advised on debt and equity capital raises for many founder-owned and private equity-backed businesses, across diverse industries. Since forming the Capital Markets Group, Zucker has been able to bring clients in to Intrepid earlier in their life cycle and generate repeat business for the firm as these clients grow. Several clients who began as capital raise mandates for Intrepid have come back to the firm for sell-side advisory. With Intrepid now part of MUFG Union Bank platform, Zucker continues to be a leader at the firm as he assists in supporting the collaboration with Union's team to advise existing clients in their strategic transactions and attract new clients.

"It's clear to me that when you do private equity well, you're making companies more efficient and helping them grow and become more profitable. That success means investors - such as public pension funds - also benefit, which contributes to the economic wealth of society."

— DAVID RUBENSTEIN



Congratulations to Fabio Simi for being recognized as one of the most influential private equity advisors in 2020.

Marsh's Private Equity and M&A team provides alternative asset investors, strategic sponsors and the M&A advisory community with pre-acquisition risk management and human capital due diligence and insurance capital solutions.

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Congratulations To Our Friend And Partner

Christine S. Shin



CHRISTINE S. SHIN
M&A/Private Equity
Department Chair

On being named among only one of eleven attorneys

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