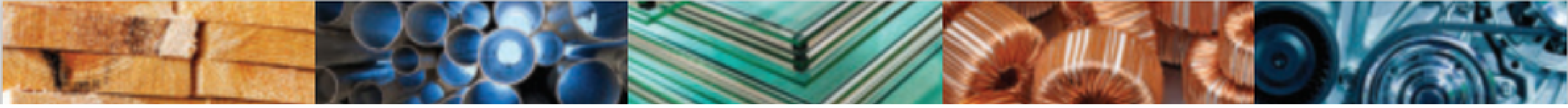
STRATEGIC M&A ADVISORS

Business Sales and Majority Recapitalizations



STRATEGIC M&A ADVISORS

The sole focus of Strategic M&A Advisors is to shepherd business owners on a new leg of their journey. We sell businesses and facilitate the creation of majority recapitalizations so that your ultimate goals and objectives become reality.

THE UNFORTUNATE REALITY

100% of business owners will exit their businesses at some point in the future. The majority will do so via a sale of the business to a third-party buyer. Unfortunately, however, only a small percentage of all business owners have a thorough understanding of all the variables involved in accomplishing this complex objective. When they do finally execute the sale of the business, it is often done without the insight they need, so the sale is transacted on the buyer's terms. Another large and growing segment of the business community is comprised of companies (and their owners) that would benefit greatly by recapitalizing a majority of the business with a local investor, private equity group, or independent sponsor.

While the marketplace of potential financial partners grows daily, many business owners have never considered how such a partnership could enable exponential growth of the business at a substantially reduced level of risk to the owner.

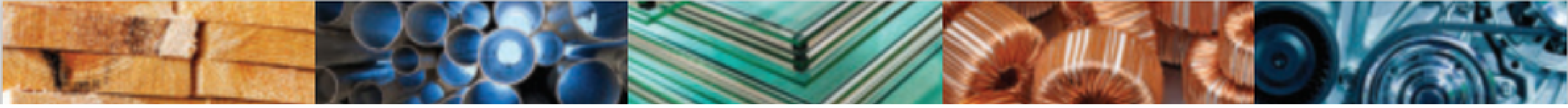
THE SOLUTION

Whether the strategy is to sell the business or recapitalize, a clearly defined and proven process should be followed in order to maximize business value and the likelihood that the other important goals and objectives of the business owner will be accomplished. At Strategic M&A Advisors, that's our business.

THE PROCESS

Every business is different. Every business owner has a different set of goals and objectives. Therefore, no two processes of selling or recapitalizing are the same. While each individual process is unique, Strategic M&A Advisors recognizes that a successful process must include a methodical game plan to affirmatively answer the many difficult questions that will arise, such as:

- What aspects of my business add to and detract from ultimate valuation potential?
- How will prospective buyers negotiate against me?
- What is the current market value of my business?
- Are my business valuation expectations reasonable?
- How do various forms of deal structure impact the valuation of my business?
- Is my business and strategic plan best suited for a strategic buyer, a financial buyer, or a hybrid?



- How can the marketplace of specific buyers (strategic and financial) for my business be identified?
- How can I access a broad, competitive marketplace of buyers without compromising confidentiality?
- What information should I provide to prospective buyers, how should I provide it, and when?
- Should I have a predetermined asking price for my business or let the market determine the ultimate value?
- At what point in the process should I invite prospective buyers to visit the business?
- At what point in the process should I involve the management team and staff?
- How many offers should I expect to receive?
- What is the best way to negotiate offers with prospective buyers?

THE BOTTOM LINE

At Strategic M&A Advisors, we understand how to position a client for maximum market value so that we can execute the best strategy for accomplishing the highest and best set of objectives. We anticipate the key questions that will arise and the best possible answers. You have worked hard to grow your business, and now it's time to capitalize on your years of hard work and dedication. Don't leave this all-important outcome to chance.

NO-COST, NO-OBLIGATION ASSESSMENT

Are you thinking about selling your business? Is a majority recapitalization in your future? Getting started is easy. Simply call Strategic M&A Advisors for a confidential no-cost, no-obligation assessment of your business and readiness to achieve your most important goals.

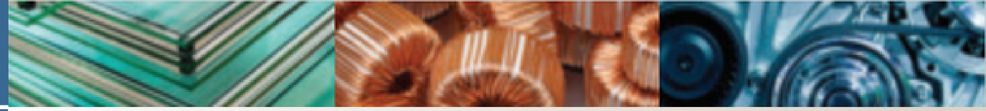
THE STRATEGIC M&A ADVISORS TEAM

We have assembled the best sell-side M&A advisory team in this part of the country. Check out our team-sheet below for more detail.

TYPES OF BUSINESSES SERVED

Strategic M&A Advisors works with all types of lower middle-market, privately held and family owned businesses. Whether your business is service or product related, we're interested in helping you accomplish your sale or majority recapitalization goals. Though our experience and best practice approach transcend industries, we have depth of success in the following:

Manufacturing	Wholesale & Distribution
Transportation	Professional Services
Health Care	Medical Equipment
Energy Services	Industrial Services
Construction	Equipment Rental



FROM A CLIENT

"SMAA took care of selling my business as if it was their own. Day or night, they responded when I needed them. Exceptional attention to detail. We wouldn't have been able to maximize our sale price without them. I would highly recommend them."

– KYLE ALLMENDINGER –

PRESIDENT, DATEK, INC

FROM A BUYER

"SMAA does an exceptional job representing their clients. They care deeply about working together with the buyer and seller to successfully close transactions that are good for everyone involved."

– STEVE HARVEY, MBA –

MANAGING DIRECTOR, DAKOTA CAPITAL, LLC

FROM A PARTNER

"I've had the opportunity to work with SMAA and its principals on multiple occasions and they are consummate professionals. They are thorough in not only guiding their clients through the sale process, but also in preparing them in advance for the rigors of the process. It is always a pleasure to work with them on a project."

– JIM NEELD –

PRESIDENT, YOUNG WELLS WILLIAMS P.A.

SAMPLE DEALS

We have closed a multitude of deals in our history. Following are but a few examples of the types of deals we've enabled over the years:

- Sold a third generation $100,000,000+ niche manufacturer to a national Private Equity Group.
- Facilitated the majority recapitalization of a $12,000,000 oil and gas service company with a regional Strategic Buyer.
- Sold a $10,000,000 hydraulics company to a regional Strategic Buyer.
- Sold a $35,000,000 components manufacturer to a large Family Office.
- Sold a $100,000,000+ infrastructure company serving the utility-scale solar industry to a Private Equity Group
- Facilitated the majority recapitalization of a $30,000,000 plastics manufacturer with a national Conglomorate.
- Sold a $4,000,000 mid-stream oil & gas rental company to a local Search Fund.
- Sold a $40,000,000 food manufacturing company to an international Strategic Buyer.
- Facilitated the majority recapitalization of a $70,000,000 metal manufacturing company with a national Private Equity Group.
- Sold an $8,000,000 food delivery company (a Private Equity Fund's portfolio company) to a national Strategic Buyer.

CONTACT US

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THE STRATEGIC M&A ADVISORS TEAM

GREG MALONEY is a managing director and has been leading clients in his role as a sell-side M&A advisor since 1995. In addition to setting the overall strategic direction of the firm, he is responsible for mapping and managing lower-middle market business sales and majority recapitalization strategies on behalf of SMAA clients. Greg is a Summa Cum Laude graduate of Millsaps College.

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RYAN HOLDER is a managing director and has been involved in sell-side M&A advisory, valuation, business advisory, and capital formation more than 20 years. Ryan earned a Bachelor of Finance degree and a Master of Accountancy from the University of Mississippi and is a Certified Public Accountant.

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GARY JONES is a director and has been dedicated to sell-side M&A advisory since 2010. He is responsible for lower-middle market business sales and majority recapitalization. He holds the Mergers & Acquisitions Master Intermediary (M&AMI) and Certified Business Intermediary (CBI) designations and has completed the Certified M&A Professional (CM&AP) program at Coles College at Kennesaw State University. Gary is a graduate of the University of Arkansas at Fayetteville with a BSBA in Finance.
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MIKE BOSCHETTI is a director, CPA and former partner with Deloitte and has advised numerous individuals and businesses regarding M&A and exit-related transactions for 30 years. Mike has a BSBA from the University of Arkansas and has completed the Certified M&A Professional (CM&AP) program at Coles College at Kennesaw State University.

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DAVID DAVIS is a director and primarily focuses on leading sell-side engagements, as well as assisting potential clients in analyzing their businesses and determining the optimal pathway to a potential transaction. His international M&A advisory background includes positions with Lockheed Martin and Boston Consulting Group. David earned his MBA from Harvard Business School and holds a degree in mechanical engineering from the University of Mississippi.

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You've Built A Great Business. Let us Help You Finish Strong.

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