

LEADERS OF INFLUENCE:

Private Equity, Investors & Advisors



THE MERCURIAL 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 the business world overall has perhaps never been more important.

Los Angeles is an area that has an 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 to be showcased here. Listed alphabetically, you'll find some of Los Angeles' thought leaders on the subject, along with information about their careers and specialties.

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

Methodology: The professionals featured in these pages did not pay to be included. Their profiles were drawn from nomination materials submitted to the Los Angeles Business Journal. Those selected for inclusion were reviewed by the editorial department. The professionals were chosen based on a demonstration of impact made on the profession and on the Los Angeles community.

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**HASAN ASKARI**

Managing Partner
K1 Investment Management

Co-founding K1 in 2011 at the age of 26, Hasan Askari's strategic vision has helped position K1 as a premier firm in the lower-middle market for enterprise software companies. Under his leadership, K1 has successfully closed over 230 deals, grown its assets under management to over \$14.9 billion, and grown its team to over 120 employees.

Askari's passion for deal generation is evident in his ability to cultivate partnerships with founder entrepreneurs, even when they were not actively seeking funding or considering selling their businesses. He is recognized for his instrumental role in building K1's two largest portfolio companies and has led or co-led 9 platform investments and 28 add-on acquisitions, totaling over \$2.95 billion in transaction value.

**RYAN BARNCASTLE**

Partner
Barnes & Thornburg LLP

Ryan Barncastle, a partner in the Barnes & Thornburg's Corporate Department, is a business transactional attorney with significant experience in several legal disciplines, including corporate, private equity, real estate and securities.

With nearly two decades of sophisticated experience, Barncastle has established an international practice representing private equity firms, venture capital funds and institutional family offices in a wide array of corporate, finance, securities and real estate transactions with a focus on substantial, complex and cross-border transactions. Barncastle represents sophisticated clients all over the world with their most complex matters. Given his skill as a dealmaker, his public and private clients appreciate that they can rely on him as a trusted adviser in connection with their most complicated transactions.

**PIPPA BOND**

Partner
Kirkland & Ellis

Pippa Bond is one of the top capital markets attorneys in the country. Her diversified clients include private equity funds, hedge funds, public companies, special purpose acquisition groups, direct lending and other credit funds, and corporate borrowers and investors in connection with a wide variety of complex transactions.

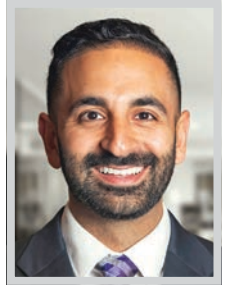
Bond serves as primary outside counsel for Los Angeles-based Ares Management Corporation, a leading global alternative asset manager with \$378 billion AUM. After leading its 2014 IPO, Bond is now part of an elite Kirkland team who advise Ares and its portfolio companies on significant matters. Bond also acts as counsel to issuers, sponsors and underwriters in registered public offerings.

**CLAY BRYAN**

Senior Managing Director,
Financial Sponsors Group
B. Riley Securities

Clay Bryan is a senior managing director with B. Riley Securities, a leading middle market investment bank headquartered in Los Angeles. He has over 22 years of investment banking experience in M&A, debt and equity capital markets, private equity coverage, 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 advised entrepreneurs, private equity funds and other asset managers throughout his career.

Bryan's career in investment banking reflects his unwavering commitment to providing best-in-class M&A, capital raising, and strategic advisory services to his clients. He has worked at both bulge bracket and middle market investment banks, structuring and executing complex transactions.

**RISHI CHELLANI**

Director
Palm Tree LLC

A director of Palm Tree within the Transaction Advisory discipline, Chellani focuses on financial due diligence for both buy-side and sell-side transactions as well as post-close transition support for private equity clients. His work help to provide perspectives on financial data that enable buyers and sellers to make more informed decisions, minimize business disruption, visualize opportunities, and drive value creation. He has transaction experience across a variety of industries including consumer products, industrial services and SaaS, among others.

Chellani's combination of industry knowledge, strategic thinking, leadership skills and ethical standards make him a leader of influence in the private equity industry, deserving of recognition for his contributions and achievements.

**LEON CHEN**

Managing Partner
Kayne Anderson Capital Advisors

Leon Chen joined Kayne Anderson Growth Capital as a senior associate and in less than ten years he rose to become a managing partner of Kayne Anderson's growth private equity activities. He is primarily responsible for playing a pro-active leadership role in identifying and analyzing investment opportunities, developing actionable new investment opportunities, deal execution and creating value within existing portfolio companies.

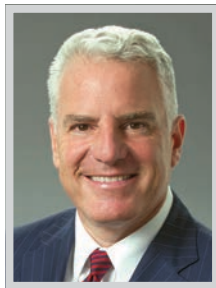
Chen has a unique ability to analyze what a company needs in order to grow to the next level and overcome the typical challenges growth stage technology companies face in their quest to scale. He has developed a strong track record of helping management teams transform their businesses into market leaders.

**CANDICE CHO**

Co-Partner in Charge,
Century City and Los Angeles Offices
Gibson, Dunn & Crutcher LLP

Candice Choh, co-partner in charge of the Century City and Los Angeles offices of Gibson, Dunn & Crutcher, is a highly talented, impactful and in demand deal lawyer. She has a broad-based practice encompassing mergers and acquisitions across a wide variety of industries and other private equity transactions, including co-investments, secondary transactions and investments in sponsors. Choh regularly counsels private equity sponsors on firm structuring and internal governance matters.

Choh's recent notable transactions include advising Stone Canyon Industries Holdings in the acquisition by Stone Canyon and Kissner Group Holdings minority owner and CEO Mark Demetree of K+S Aktiengesellschaft's Americas salt business, including Morton Salt, for \$3.2 billion.

**DAN CLIVNER**

Managing Partner
Sidley Austin LLP

Dan Clivner guides the international direction of Sidley Austin as a member of the 2,300-lawyer firm's Executive Committee. He is managing partner of Sidley's Los Angeles offices and global co-head of its global M&A and private equity group. In the past five years, Clivner has elevated the firm's global M&A/PE practice.

For 30 years, Clivner has been advising both domestic and international private equity clients, including Apollo Global, Blackstone, Siris Capital and ZM Capital on a variety of matters, including leveraged buyouts, joint ventures, public company acquisitions, and restructurings. He regularly handles high-profile transactional matters for clients across media and entertainment, telecom, technology, financial services, and retail industries.

**SIMONE COLLINS**

Partner
Holland & Knight

Starting as a senior financial consultant at a global management consulting firm before law school, Simone Collins had a vision of the attorney she wanted to become. Fresh out of law school in 2012, she worked at leading law firms, continuing her focus on PE and M&A. She then joined Holland & Knight, where she leverages her experience as a partner in the Corporate, M&A and Private Equity practice group.

Collins advises companies, private equity firms, entrepreneurs and investors across industries like technology, media, retail, professional services, hospitality and manufacturing. Her practice involves representing private companies selling to or receiving investments from private equity firms, as well as advising private equity firms on acquisitions and growth investments in private companies.

**NISHITA CUMMINGS**

Managing Partner and Co-Head of Kayne
Anderson Growth Capital
Kayne Anderson Capital Advisors

Since joining Kayne, Nishita Cummings has ascended from being an associate to being named managing partner. During her 16 years at Kayne, Cummings has played a key role in many of the 53 platform investments and 28 exits completed by KAGC across six funds and seven co-investment vehicles. Nishita has also been responsible for building the Growth Equity and Credit platform to over \$1.3 billion in assets under management.

Under Cummings's leadership, KAGC formally launched its Credit strategy in 2022, focused on stage-specific technology companies looking for a flexible capital solution. This standalone credit strategy offers a capital efficient alternative for strong technology businesses that want to take advantage of a lower cost capital structure.

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AYTAN DAHUKEY

*Partner; Co-Leader,
Private Equity Team
Sheppard, Mullin, Richter
& Hampton LLP*

Aytan Dahukey, a partner and co-leader of Sheppard Mullin’s Private Equity team, is a trusted advisor to private equity funds. He has significant experience handling their large leveraged buy-out, add-on and divestiture transactions and has also represented owners of a wide variety of private businesses in sales to private equity funds and other strategic investors.

Dahukey has worked across a variety of sectors, though he has particularly deep experience in the health insurance and healthcare service spaces. In addition to traditional deal structures, Dahukey assists with cutting-edge transactions stemming from healthcare reform, including the organization, structuring and integration of hospital foundation clinics with physician practices.



KEN FIRTEL

*Co-Founder; Managing Partner
Transom Capital Group*

Ken Firtel is a co-founder and managing partner at Transom Capital Group, which he co-founded with Russ Roenick in 2008. Transom Capital is a leading private equity firm specializing in middle market investments. The firm actively seeks to build long-term value by partnering with established companies and assisting them in achieving transformative growth. Transom Capital’s proprietary functional pattern recognition capabilities, access to capital and a proven value creation methodology combines with management’s industry expertise to create improved operational efficiency, significant top-line growth, cultural transformation and overall distinctive outcomes.

Transom Capital is currently investing out of its fourth fund, having successfully executing its strategy in its three prior funds.



STEVE FRIED

*Head of Originations
Mesa West Capital*

Steve Fried is a principal at Mesa West Capital. In 2023, he was named head of originations at Mesa West Capital, overseeing the national loan originations teams in Los Angeles, New York, Chicago and San Francisco, which typically originates approximately \$3 billion of mortgages per year.

Fried also serves on both Mesa West’s investment and management committees. Fried’s more than 18 years of investing experience has been instrumental in helping the firm navigate the market challenges created by the COVID-19 pandemic and the current high-interest rate environment. He was named a principal in 2010 and has helped grow the firm and specifically its originations platform.

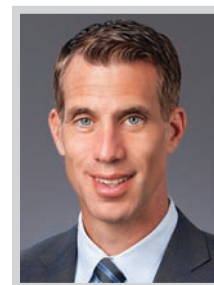


RONNIE GUL

*CEO
Mesa West Capital*

Ronnie Gul is a Principal at Mesa West Capital. In 2023, he was named co-chief executive officer alongside fellow co-CEO Raphael Fishbach. Gul is based in Mesa West’s headquarters in Los Angeles, while Fishbach is based in New York. Under their direction Mesa West manages a lending portfolio that includes all major property types with loan sizes ranging from \$20 million up to \$400 million.

Under Gul’s leadership, Mesa West is one of the top debt fund managers in the United States. He has been a driving force in Mesa West’s growth from a West coast debt platform to one of the premier US commercial real estate lenders.



JORDAN HAMBURGER

*Partner; Co-Leader, M&A Team
Sheppard, Mullin, Richter
& Hampton LLP*

Jordan Hamburger is a partner and co-leader of Sheppard Mullin’s Mergers and Acquisitions team. Throughout his 20+ years of experience as a successful M&A and private equity attorney, Jordan has led numerous middle-market companies through pivotal mergers and acquisitions.

As a co-leader of the firm’s M&A team, Hamburger oversees one of the firm’s largest practice groups, which is comprised of approximately 225 attorneys. Among other responsibilities, Jordan plans and conducts the team’s monthly meetings, which regularly include educational and professional development programming such as presentations from M&A experts, business development and practice management training and more.

Barnes & Thornburg congratulates its own **Ryan Barncastle** for being recognized by the Los Angeles Business Journal as a 2024 Leader of Influence: Private Equity. We join in celebrating his dedication and outstanding contributions to the legal field and community in the realm of private equity.



RYAN BARNCASTLE

ATLANTA BOSTON CALIFORNIA CHICAGO
DELAWARE INDIANA MICHIGAN MINNEAPOLIS
NASHVILLE NEW JERSEY NEW YORK OHIO
PHILADELPHIA RALEIGH SALT LAKE CITY
SOUTH FLORIDA TEXAS WASHINGTON, D.C.

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**CHANNING HAMLET**

Managing Director; Co-Owner
Objective, Investment Banking
& Valuation

Channing Hamlet is a managing director and co-owner of Objective, Investment Banking & Valuation, a leading investment banking and valuation firm serving the middle market. Hamlet leads the Business Services Practice for Investment Banking, and concurrently operates as the head of the Valuation Advisory Services Practice.

Hamlet is a results-driven executive that has 25+ years of experience advising business owners on management issues, transaction execution and business valuation. As one of the primary transactional bankers at Objective, Hamlet has personally closed over 25 sell-side transactions over the last five years and countless others throughout his career, ranging in size throughout the middle market.

**BRANDON HOWALD**

Partner
Ropes & Gray LLP

When global law firm Ropes & Gray decided to stake a claim in the Southern California private equity market with a new law office, it needed a standout attorney to make a splash. Enter Brandon Howald, a veteran private equity attorney with over 20 years of experience in California. Hired for his legal chops and ability to bring in loyal clients from his practice, Howald has helped build out the Los Angeles office to over 30 attorneys in just two years.

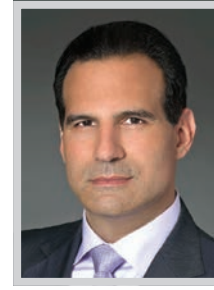
Howald is a dedicated adviser to GI Partners, Compass Diversified, and other private equity firms and investors and is involved in the fast-growing digital infrastructure sector as a key member of Ropes & Gray's digital infrastructure industry group.

**JOE KACZOROWSKI**

Partner, Corporate & Financial Services
Willkie Farr & Gallagher LLP

Joe Kaczorowski is a partner in Willkie's Private Equity Practice Group. Kaczorowski counsels private equity and venture capital funds and their portfolio companies, as well as strategic acquirers and operating companies, on mergers and acquisitions, growth equity and venture capital transactions, as well as day-to-day general corporate needs. Prior to joining Willkie in 2022, he served as senior vice president, assistant general counsel of Platinum Equity.

Among Kaczorowski's recent highlights has been his work advising Monogram Capital Partners on its acquisition of a majority stake in Tru Fragrance & Beauty, the global beauty brand builder whose portfolio includes owned, licensed, and exclusive fragrance and beauty brands sold to national beauty and apparel retailers and direct to consumers.

**MEHDI KHODADAD**

Partner
Sidley Austin LLP

Mehdi Khodadad stands as an exceptional example of influence and leadership in private equity law and business. An extraordinary dealmaker, Khodadad excels in the variety, creative structuring, complexity and output of deals he advances. He serves as co-leader of Sidley's global Private Equity practice, a testament to his strong leadership skills.

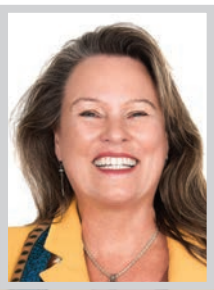
At a time when the global private equity industry has seen a reduction in deals and transactions, Khodadad has led more than 35 deals over the last 18 months, with an aggregate value exceeding \$20 billion. During this time, Khodadad led some of the industry's most important private equity deals for long-time client, Santa Monica-based Clearlake Capital Group L.P.

**JASON S. KIM**

Partner, Corporate Law
Blank Rome LLP

Jason S. Kim, a 30-year deal lawyer, represents domestic and foreign companies, financial institutions, funds, serial entrepreneurs and high net-worth individuals in corporate and real estate transactions and related financing with emphasis on cross-border deals. Kim's deals involve foreign buyers, PEs, and banks.

Among Kim's most significant deals are investee-side representation of a green energy company in raising over \$150 million through four rounds of equity financing; issuer-side representation of a Korean airline in the private placement offering of \$200 million in unsecured bonds; and investor-side representation of a Korean social, on-line gaming company in acquiring controlling interest in a US social, on-line gaming company for \$130 million.

**DEBORAH La FRANCHI**

CEO
SDS Capital Group

During a distinguished career, SDS Capital Group's founder and CEO Deborah La Franchi has led the charge for women in a male dominated industry, and helped provide opportunities for other women with her talent and her passion.

In 2001 La Franchi founded SDS Capital Group, an institutional fund manager and private lender that focuses on providing both debt and equity for developers of affordable housing throughout the United States with the goal of engaging the private sector in the battle against poverty. Since that time La Franchi has built SDS into a firm with over \$1.9 billion assets under management.

**ARI LANIN**

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

Ari Lanin balances a dynamic corporate private equity practice with his leadership role as co-chair of Gibson Dunn's Private Equity Practice Group. Clients across a wide range of industries turn to Lanin for his guidance on public and private merger transactions, stock and asset sales, joint ventures and strategic partnerships. Lanin regularly advises well-known private equity firms in Los Angeles on their most important and complex transactions.

Lanin's recent representations include his work for Platinum Equity, a global investment firm with over \$48 billion of assets under management and a portfolio of approximately 50 operating companies that serve customers around the world, in its \$4.6 billion acquisition with Solenis of Diversey Holdings and \$5.25 billion acquisition of Solenis.

**RAY LASOYA**

Partner, Corporate & Financial Services
Willkie Farr & Gallagher LLP

Ray LaSoya has diverse experience guiding private equity investors and their portfolio companies, as well as public and private companies, in complex transactions and in their day-to-day legal affairs. He is sought out to advise on an array of major corporate transactions, including acquisitions and divestitures, leveraged buyouts, recapitalizations, minority growth investments, strategic alliances and joint ventures.

LaSoya has decades of experience representing top private equity sponsors across a vast range of industries, including communications, media, entertainment, technology, retail, legal services, financial services, manufacturing and more. He revised advised Monogram Capital Partners on its acquisition of a majority stake in Tru Fragrance & Beauty, the global beauty brand builder.

**NEIL MALIK**

Founder & CEO
K1 Investment Management

Since founding K1 in 2011, Neil Malik's leadership has led the firm to successfully close over 230 deals, grown its assets under management to over \$14.9 billion, and expanded its team to over 120 employees. He is dedicated to K1's mission: partnering with management teams to build category-leading software businesses to transform industries. He founded K1 with a passion for making people more productive around the world with enterprise software.

Under Malik's leadership, K1 has been recognized for multiple industry awards, including recognition as a top minority-owned asset manager by the Knight Foundation and a feature in HarbourVest's diverse-led managers spotlight.

**PETER MASSUMI**

Founding Partner
Massumi + Consoli LLP

Peter Massumi is a co-founder and managing partner of Massumi + Consoli LLP in Los Angeles, where he represents private equity firms and their portfolio companies, along with other dynamic and acquisitive enterprises, to structure, negotiate and execute a wide range of complex transactions, including platform and add-on acquisitions, leveraged buyouts, carve-outs, strategic mergers, structured growth investments, dispositions, special situations and joint ventures. He also counsels clients on various general corporate and governance matters.

At the foundation of Massumi's practice is a commitment to dealmaking through a focus on the highest standards of excellence, and endeavoring to provide elegant and commercial solutions to the most nuanced challenges.

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ANANT PATEL

Partner
GHJ

Anant Patel embodies the essence of excellence and innovation in the realm of advisory services. Patel has earned a sterling reputation as a trusted advisor to private equity, and his work in facilitating deals across borders has propelled the success of GHJ's Advisory and Transaction Advisory Services Practice but have also left an indelible mark on the global stage.

Patel is the driving force behind GHJ's Advisory and Transaction Advisory Services Practice, where his leadership has further enhanced the Firm's global reputation. He has assisted on deals ranging from \$20 million to \$1.2 billion and is a certified M&A advisor. Many of his clients include private equity groups and portfolio companies.

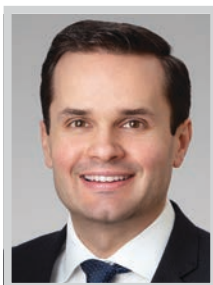


TIM POYDENIS

Partner
Holland & Knight

Tim Poydenis is the co-head of Holland & Knight's Emerging Companies and Venture Capital practice and is a corporate partner in the firm's Century City office. He plays an integral role in shaping the long-term business strategy of the firm and its clients nationwide.

Poydenis' clients range from startups to publicly-listed companies. On the company side, his practice focuses on representing emerging growth companies throughout their corporate life-cycle. He advises them on and handles all transactions and deals – from financings and governance to strategic buy-side and sell-side merger and acquisition transactions, partnerships, day-to-day corporate work and a company's ultimate exit via mergers, acquisition (M&A) deals or otherwise. He represents companies at all life stages.



MICHAEL REEVES

Partner
Kirkland & Ellis LLP

Michael Reeves, a partner in the Los Angeles office of Kirkland & Ellis, is a well-known leader in advising premier private equity and other alternative asset management firms on complex "GP stake sale" and other asset management M&A transactions, including mergers and acquisitions of asset management businesses; purchase and sales of common and preferred equity interests in private equity, private credit and real estate managers; seed investments by financial sponsors, family offices and strategic investors in emerging investment managers; and related joint venture and partnership arrangements.

Reeves is the recognized leader west of the Mississippi within the rapidly evolving GP stake sale and asset management M&A space.



SHLOMI RONEN

Managing Principal
Dekel Capital

Shlomi Ronen is a managing principal and founder of Dekel Capital where he heads the company's JV Equity, Capital Advisory and Correspondent Lending platforms. During his more than 20-year career in real estate, including the last 18 years working in a real estate capital advisory role, Ronen's impact on the commercial industry landscape is well documented.

Under Ronen's leadership Dekel serves an elite group of commercial real estate operators, investors and developers with an exclusive, boutique approach that allows the firm to create tailored solutions that address your unique capital challenges. His deep relationships within the capital markets give him an advantage in providing his national clientele with best-in-class structured financing solutions and funding execution.



TREVOR SALIBA

Chairman & CEO
NMS Capital Group LLC

Trevor Saliba is the founder, chairman and CEO of NMS Capital Group, a family office backed private equity investment firm with investments across multiple asset classes including real estate, financial and business services, infrastructure and energy, consumer products, technology and media.

Saliba also serves on the board of directors and as COO of Swiss based global investment firm, NFG SA. In addition, he is the founder and chairman of NMS Consulting, a global management consulting and strategic advisory firm where he leads a global team of over 250 professionals across 15 offices throughout the US, Europe, Middle East and Asia. The team was formed when NMS Capital Group spun off its in-house consulting practice into a dedicated management consulting firm.



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MARTIN SARAFI

Managing Partner
Century Park Capital Partners

Martin 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 and buyouts. He is a member of the firm's Investment Committee and currently sits on the boards of Accelalpha, MCCi, and NCP Coatings.

During his time with Century Park Capital Partners, Sarafa has overseen the firm complete over 70 acquisitions, including 24 platform acquisitions and 50 add-on acquisitions. In December 2021, Sarafa led the acquisition of a Chemicals platform, NCP Coatings, a developer and manufacturer of technologically advanced performance coatings solutions for the military, industrial, commercial and forestry end markets.

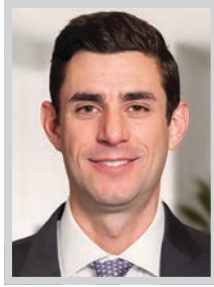


DAN SHEA

Managing Director
Objective, Investment Banking & Valuation

Dan Shea is a managing director of Objective, a leading investment banking and valuation firm serving the middle market. He directs Objective's Manufacturing & Distribution practice, a sector he has been involved in for nearly 30 years.

Shea is a results-oriented leader with an extensive track record of success as an investment banker. He is adept at building relationships, developing business opportunities, determining and implementing strategic initiatives, leading teams, providing solutions to complex business issues, and executing and closing transactions in high pressure, high value and time-sensitive situations. To date, he has closed in excess of 100 sale transactions with an aggregate valuation of \$3.5 billion.



MICHAEL SIEGLEN

Senior Vice President
Palm Tree LLC

Michael Sieglen is a senior vice president for Palm Tree's Strategic Finance discipline. He brings over a decade of experience in corporate finance, investment banking and private equity. He works to customize Palm Tree's playbook for each private equity client to build processes and tools that keep their data and information flowing efficiently throughout transactions and other strategic events. His client deliverables are fit-to-purpose and also repeatable to help each client yield valuable and actionable insights.

Sieglen is committed to excellence in all aspects of his work, constantly striving to improve himself and his organization. He holds an impressive track record of success in private equity, that has led to delivering strong returns for investors.



AARON SOLGANICK

CEO
Solganick & Co.

Aaron Solganick has built a team and company that specializes in advising private equity firms and companies on software and IT services mergers and acquisitions. He has completed multiple M&A transactions with PE firms including Sunstone Partners, Sheridan Capital Partners, Fort Point Capital Group, Alerion Capital Group, HCAP Partners, Quad Partners, and others. Solganick is active in local and national private equity deal associations and has built a strong reputation among his peers.

Solganick continues to gain recognition among his clients and within the PE and IB communities. His successful track record in closing deals that add value to his clients has helped Solganick build a successful M&A practice.



DAVID SUTTON

Partner
GHJ

As the Private Equity Practice leader at GHJ, David Sutton has amassed a stellar track record of success, facilitating many high-stakes transactions on behalf of clients that have propelled businesses to new heights.

Sutton's expertise in M&A strategy has been instrumental in guiding clients through complex negotiations and ensuring the realization of their strategic objectives, and his insights into the industry have cemented his position as an industry expert. He works with private equity firms to find and execute investment opportunities, manage and grow portfolio businesses and plan for a successful exit. This is achieved while remaining in alignment with their partners' philosophies and cultures and navigating economic factors.

Willkie congratulates partners **Ray LaSoya** and **Joe Kaczorowski**



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Private Equity, Investors & Advisors

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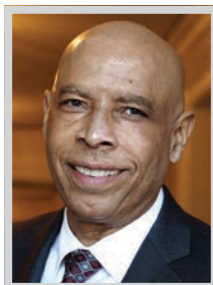
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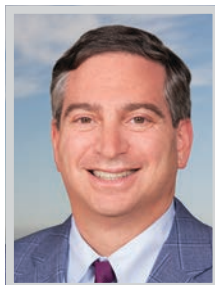
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GEORGE SWAIN
Founder / CEO
 GeorgeSwain Investments

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 \$1.2 billion of transactions. Throughout his career, Swain has leveraged his deep industry knowledge to take a strategic approach to dealmaking rather than chase transactions. He has a broad range of experience in mergers and acquisitions, debt and equity financing and strategic partnerships.



THOMAS A. WALDMAN
Partner
 Stradling Yocca Carlson & Rauth LLP

Tom Waldman has represented private equity funds, business owners and management teams across the table from PE funds, for more than 25 years. His career path has included private practice with Munger, Tolles & Olson, Rioridan & McKinzie, and Bingham McCutchen, then a leadership role with Los Angeles-based private equity firm The Gores Group beginning in late 2007. In 2018, he joined Stradling to lead its private equity practice.

Business owners seeking assistance in private equity transactions then turn to Waldman for referrals to investment bankers, accountants, wealth managers and others. This network in turn provides valuable opportunities for Waldman's private equity clients to reach companies that need an immediate transaction without a time-consuming marketing process.



ALICE YUAN
Partner
 Massumi + Consoli LLP

Throughout the course of her career, Alice Yuan has excelled as both a corporate attorney and as a public company executive. She is a partner at Massumi + Consoli, where she not only delivers exceptional service to discerning investors and enterprises, but also plays a pivotal role in the firm's growth and development. This includes leading recruitment initiatives and refining business operations, all while seamlessly managing client engagements.

Yuan provides exemplary legal counsel in the context of mergers and acquisitions, facilitating clients' swift navigation of pivotal business decisions. She has extensive experience working with private equity firms and their portfolio companies, along with other enterprises, to structure, negotiate and execute a wide range of complex transactions.



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 buyout transactions, as well as monitoring portfolio company investments. Zaczepinski currently sits on the boards of Total Access Elevator, CJ Pony Parts, MCCi, Accelalpha, and Dominion Care.

Throughout his career, Zaczepinski has gained extensive experience analyzing and valuing companies for recapitalization, leveraged buyouts, and mergers and acquisitions. Zaczepinski recently led Century Park's recapitalization of Total Access Elevator, which provides elevator modernization, maintenance and repair services in the greater Los Angeles area. Zaczepinski has also specialized in the Auto Aftermarket industry. He led Century Park's recapitalization of CJ Pony Parts.



JONATHAN ZUCKER
Managing Director;
Head of Capital Advisory
 Intrepid Investment Bankers

Jonathan Zucker is a managing director and head of the Capital Advisory Group at Intrepid Investment Bankers. He joined Intrepid in 2014 to establish and lead the firm's Capital Advisory practice. With Intrepid, Zucker has advised on debt and equity capital raises for businesses across diverse industries including consumer products, digital media, industrials, software and tech-enabled business services.

Since forming the Capital Advisory Group, Zucker has established trusted relationships with clients, often returning to Intrepid for sell-side engagements after successful capital raises. Among his notable transactions was his recent work advising Prime Street Advisors on its transformative acquisition of Right Choice In-Home Care.

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Private Equity and Venture Capital Industry Shows Resilience and Optimism in 2024

Trends include increased interest in private credit asset allocations and AI playing a larger role in deal sourcing and target selection

The private equity industry is showing resilience and optimism for 2024 despite shifting market dynamics, according to the S&P Global Market Intelligence 2024 Private Equity and Venture Capital Outlook. According to the outlook, private equity executives are notably more optimistic about deal activity in 2024 with 60% expecting an improvement, compared to 34% last year. Survey respondents also showed increased interest in private credit and shared that artificial intelligence (AI) will play a larger role in deal sourcing and target selection.

“This year’s survey revealed more optimism among both general partners (GPs) and investors as they are racing for a return to increased deal activity with increasing valuations allowing them to exit their backlog of investments and return cashflows to limited partners (LPs),” said Thomas Mercieca, associate director and lead author for the report, at S&P Global Market Intelligence. “There is also increased investor interest in private credit allocation, with 61% of LPs reporting that they will increase

their asset allocation to the asset class in 2024. We are pleased to see that despite macroeconomic challenges still lingering, the industry remains adaptable and poised for growth throughout 2024.”

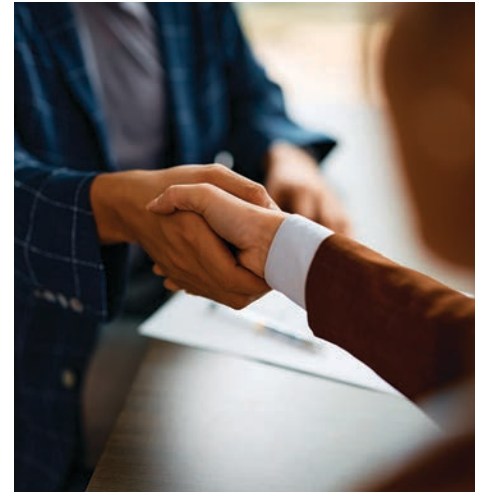
Key highlights from the 2024 Private Equity and Venture Capital outlook:

- Mid-tier and smaller private equity (PE) firms are more optimistic for the deal activity to pick up in 2024 compared to their larger peers.
- 61% of limited partners (LPs) investing in private markets reported they will increase their asset allocation to private credit in 2024.
- Presently, fund managers prioritize personal networks and referrals for sourcing investment opportunities. However, 54% of GP investment professionals foresee AI influencing deal sourcing and target selection in the future.
- Among private equity GPs, in the past year 37% reported expanding their use of private credit in deal financing, with larger PE firms in particular making more use of private credit over bank loans.
- Private equity GPs feel the fundraising outlook has bottomed out: only 15% of GP respondents expect deteriorating fundraising conditions in 2024, versus 45% at the start of 2023. However, among venture capital (VC) firms there are remaining concerns about LPs reducing their allocation to VC.

‘This year’s survey revealed more optimism among both general partners and investors as they are racing for a return to increased deal activity with increasing valuations allowing them to exit their backlog of investments and return cashflows to limited partners.’

- A majority of VC professionals expect deal activity to improve in 2024 (68%), but there are a substantial number of respondents saying conditions will stay the same as 2023 (28%).

The S&P Global Market Intelligence Private Equity and Venture Capital Outlook surveyed a total of 370 global private equity, venture capital and limited partner respondents across North America, Latin America, Asia Pacific, Middle Eastern and Africa regions. The survey was fielded between November 16,



2023 and January 12, 2024 covering questions on deal activity, strategy changes, market and firm-level challenges, sustainability consideration and technology adoptions.

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