



USCAPITAL

**GLOBAL GROWTH
CAPITAL**



US Capital

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uscapital.com

INTRODUCING US CAPITAL

The US Capital team offers you unique synergy across its expanding spread of financial products and services, under a single flagship brand with international reach, US Capital. We have provided asset management and corporate finance services to our clients for over 20 years. Our integration of client services across investment banking and wealth management enables an overall strategy of maintaining consistent balance across asset classes, risk profiles, and liquidity goals. We can serve you internationally with relationships in most global financial centers.

The US Capital brand includes US Capital Global Investment Management, US Capital Global Securities, US Capital Global Wealth Management, US Capital Global Realty, and our Corporate Finance division.

INVESTMENT MANAGEMENT AND FUNDS MANAGEMENT

US Capital Global Investment Management, LLC offers both private investors and institutional investors an opportunity to invest in a variety of funds designed for the different risk tolerances and investment objectives of accredited investors. These funds include business credit, equity, venture capital, and real estate.

We are able to set up, manage, and advise private investment funds as the General Partner or investment advisor, to manage investor relationships, and with our registered broker-dealer affiliate *US Capital Global Securities, LLC*, to raise funds for new and mature, demonstrably profitable strategies.

WEALTH MANAGEMENT WITH PRIVATE CLIENT SERVICES

At *US Capital Global Wealth Management, LLC*, we take a personal approach to actively managing client positions in risk-adjusted portfolios. We closely follow many individual stocks and sectors, and look carefully for opportunity in undervalued assets or potential near-term growth in these liquid public assets.

DEBT & EQUITY INVESTMENTS, PRIVATE PLACEMENTS, AND MERGERS & ACQUISITIONS

We have extensive expertise in providing debt, equity, and M&A for small and lower middle market businesses, often owned by our clients. *US Capital Global Partners, LLC* is a fully licensed commercial lender, and our team, with over 100 years of collective underwriting and lending experience, has funded and advised on several billion dollars in loans.

We have an extensive network of high-net-worth private investors, institutional investors, and registered investment advisors who make equity investments in early and growth-stage companies. We utilize the latest in securities Reg-Tech to showcase investments on our custom digital offering platform. All securities are offered by *US Capital Global Securities, LLC*, member of FINRA and SIPC.

WHAT WE ARE ABOUT

ACCESS TO WEALTH CREATION

Alternative investments create and preserve wealth. We offer investment advisors, accredited investors, and institutional investors participation in direct private placements of debt and equity or investments in historically successful alternative investment funds.

TECHNOLOGICAL INNOVATION

Our technological innovation in finance makes smaller and alternative investments more efficient. Our use of

the latest financial regulations and platforms allows broad-based public advertising and general solicitation of investments to qualified investors.

PROFITABLE IMPACT INVESTING

Offering socially beneficial and economically profitable investments is part of our company culture. Sustainable projects, positive impact infrastructure, and job-creating corporate financing can all do social good while also being profitable for our investors.



INVESTMENT & FUNDS MANAGEMENT

US Capital Global Investment Management, LLC was founded by Jeffrey Sweeney as an alternative asset manager that leverages his 12-year track-record of successful fund management in debt and equity. We offer both private investors and institutional investors an opportunity to invest in a variety of funds designed for the different risk tolerances and investment objectives of accredited investors. These funds include business credit, equity, venture capital, and real estate.

US Capital Global Investment Management, LLC, in conjunction with our registered broker-dealer affiliate US Capital Global Securities, LLC, is always willing to consider new fund management and partnership opportunities in association with seasoned execution teams in alternative strategies. We are able to set up, manage, and advise private investment funds as the General Partner or investment advisor, to manage investor relationships, and to raise funds for new and mature, demonstrably profitable strategies.



INVESTMENT OPPORTUNITY

US Capital Global
Lending LLC

Promissory Notes
\$100,000,000



Offering Type	Offering Size	Preferred Return	Minimum Purchase	Industry	General Partner
Limited Partner Unit	\$100,000,000	2% quarterly/ 8% annually	\$25,000 per unit	Lending Fund	USCIM

INVESTMENT OPPORTUNITY

SMBs are the engine of the economy. These businesses consistently demonstrate attractive performance metrics, with revenue growth for companies with \$10 million to \$100 million of revenue being higher and significantly more stable than that of the S&P 500. The lower and middle market has consistently delivered strong performance during both recessionary and growth periods of the overall economy.

The Issuer believes that there continues to be a thriving SMB segment seeking such alternative debt financing and looks for parties that have robust proprietary flow of lending opportunities to invest in qualified companies.

INVESTMENT OPPORTUNITY

US Capital Business
Credit Income Fund, LP

LIMITED PARTNERSHIP
\$250,000,000



Fund Name:	US Capital Business Credit Income Fund, LP (the "Fund")
Total Fund Size:	\$250,000,000
Fund Type:	Open-ended private investment fund
Investment Objective:	To both preserve principal and achieve consistent attractive returns by making primarily senior debt investments in small and lower middle market private and public companies located primarily in the United States
General Partner and Investment Adviser:	US Capital Global Investment Management, LLC
Placement Agent:	US Capital Global Securities, LLC
Fund Administrator:	Perennial Fund Services, LLC
Fund Auditor:	Cropper Accountancy Corporation

INVESTMENT OBJECTIVE

To both preserve principal and achieve consistent attractive returns by making primarily senior debt investment in small and lower middle market private and public companies located primarily in the United States.

INVESTMENT OPPORTUNITY



US Capital Global
QT Imaging LLC

CONVERTIBLE NOTE
\$30,000,000



Offering Type	Offering Size	Minimum Purchase	Industry	Stage
Convertible Note	\$30,000,000	1 Unit (\$100,000)	Medical Imaging Devices	Growth

INVESTMENT OPPORTUNITY

QT is seeking USD 30,000,000 in the form of convertible notes to secure additional clearances for its breast scanner, fund production ramp up, and support improvements to the device.

QT's quantitative transmission ultrasound system, the QTscanner, generates high-fidelity whole breast, extremity, and body images that provide unique visual and growth information about the bulk properties of tissues as well as the physical structures within the body using low-frequency, low-energy sound. Unlike X-ray CT and MRI, the QTscanner does not require ionizing radiation, magnetic fields, or contrast agent injection, but instead exploits the intrinsic tissue contrast.

INVESTMENT OPPORTUNITY



US Capital Global
EQITrade LLC

MEMBERSHIP UNITS
\$5,000,000



Offering Type	Offering Size	Price Per Unit	Industry	Stage
Membership Units	\$5,000,000	\$25,000 (US)	Digital Banking	Growth

INVESTMENT OPPORTUNITY

EQITrade Limited is seeking to raise USD 5,000,000 in equity to improve and add new features to EQIBank's digital banking platform, provide working capital and retire debt. (Debt retirement might change as conversion to equity is being negotiated).

The issuer is a Special Purpose Vehicle structured to allow investors' indirect ownership of Cayman Islands based EQITrade Limited, which is the parent company of EQIBank Limited with 100% ownership. Direct investment possible for certain investors, e.g. strategic investors.

Fund Management Opportunities: Both emerging and seasoned strategy management teams will typically look for ways to raise capital from friends and family investors. However, there are usually limits to the amount of capital that can be raised that way. Often the opportunities to grow the strategy are robust, but growth is constrained by either the distraction of fundraising, the need for third-party due diligence, or the limited investor resources available. High regulatory standards can also play a role in restricting successful teams from finding sufficient funds for growth.

INVESTMENT OPPORTUNITY



US Capital Global
Denvr A, LLC

MEMBERSHIP UNITS
\$10,650,000

INVESTMENT OPPORTUNITY



US Capital Global
Sundance, LLC

LIFE INSURANCE-LINKED
BONDS \$500,000,000

INVESTMENT OPPORTUNITY



US Capital Global Business
Credit Income Fund, LP

LIMITED PARTNERSHIP
\$250,000,000

INVESTMENT OPPORTUNITY



Metals House, Inc.

GOLD-BACKED NOTE
\$150,000,000

INVESTMENT OPPORTUNITY



US Capital Global
CardLab, LLC

MEMBERSHIP UNIT
\$10,000,000

WEALTH MANAGEMENT

We actively manage positions in risk-adjusted stock portfolios. As early adopters and innovators in the now popular quantitative analytics, we have had remarkable success with many long-term clients designing and managing diversified portfolios.

Our analysts also very closely follow many individual stocks and sectors. We look carefully for opportunity in undervalued companies or potential near-term growth in these liquid public securities.

We offer personal financial, retirement, and high-level tax planning. Our professionals are very experienced in these matters and welcome the opportunity to help clients with their long-term financial needs.

PRIVATE CLIENT SERVICES

Our private clients often have alternative investments in private debt, equity, real estate, or family businesses. If you are interested in expanding, refinancing, selling, or acquiring these assets, your wealth advisor can provide easy access to our investment bankers for advice or to facilitate those transactions.

We have extensive expertise in providing debt, equity, and M&A for small and lower middle market privately held businesses located in the US or abroad. Our Investment Banking team also has many carefully reviewed alternative investment opportunities for direct investment into private debt or equity, as well as professionally managed, diversified funds focused on these types of investments.

Please feel free to contact one of our licensed wealth managers to see if US Capital can be of service.



COMPREHENSIVE WEALTH MANAGEMENT

- Collaborative planning
- Socially responsible investments and legacy planning
- Plan implementation – stocks, bonds, ETFs, mutual funds, real estate, alternatives
- Full-time account oversight and continual account review
- Tax minimization
- Wealth protection

ALTERNATIVE INVESTMENT OPPORTUNITIES

- High quality securitized credit investments
- High quality, proven tactical equity investments
- High quality institutional commercial real-estate investments
- Enhanced and steady portfolio returns



FOCUS ON YOUR RETURNS WITH LOWER FEES

- Institutional share class fund securities with low expense ratios
- Favorable custodial arrangements
- Highly competitive management fees
- Removal of industry “hidden” fees
- US Capital Global Wealth Management receives no compensation for brokerage trading activity. As an independent wealth manager, our interests are aligned.



EXPERIENCED MANAGEMENT TEAM

- Industry leaders in the middle market private commercial lending market
- Industry leaders in tactical equity investing and portfolio risk mitigation
- Top-tier institutional experience in equity, option, and debt investing

BROAD AND UNIQUE INVESTMENT CAPABILITIES

- Affiliate company US Capital Global Investment Management specializes in senior securitized lending and special situations equity financing
- Over \$4 billion worth of deal flow reviewed each year
- Only quality investment opportunities from this pool are offered to Wealth Management clients.



Jeffrey Sweeney
Chairman & CEO



Charles Towle
Managing Partner & COO



Frank Villarreal
Managing Director and Partner

All investing is subject to risk, including the possible loss of the money you invest. Diversification does not ensure a profit or protect against a loss.

DEBT SOLUTIONS

US Capital Global Partners, LLC is a fully licensed commercial lender, and our team, with over 100 years of collective underwriting and lending experience, has funded and advised on several billion dollars in loans. Our debt financing amounts for small-cap and lower middle market companies range from \$5,000,000 to over \$500,000,000. US Capital makes both direct investments and co-investment from a family of private funds under our direct management.

GROWTH CAPITAL AND ASSET-BASED LENDING

The US Capital team has the experience and resources to leverage business assets and cash flow to secure maximum funding amounts for working capital and growth capital. We can provide financing for almost any company with assets—including inventory, accounts receivable, purchase orders, machinery and equipment, commercial real estate, and intellectual property.

CUSTOM CORPORATE FINANCE SOLUTIONS

Cash Flow Loans: Companies with above-average or exceptional positive cash flows can expect low commercial rates with affordable and flexible loan structures. We provide maximum availability with covenant-light structures and rapid funding.

Asset Based Loans: Companies with average or below-average cash flows or credit-worthiness can expect asset-based loans with a focus on collateral, rather than credit-worthiness, and therefore an attractive alternative to traditional bank financing. You can expect competitive pricing, expedited funding, and fewer financial covenants than bank loans. Often, US Capital is able to increase availability through the discovery of credit enhancers and ways to mitigate credit risks, ensuring you get optimal and custom financing for your business.

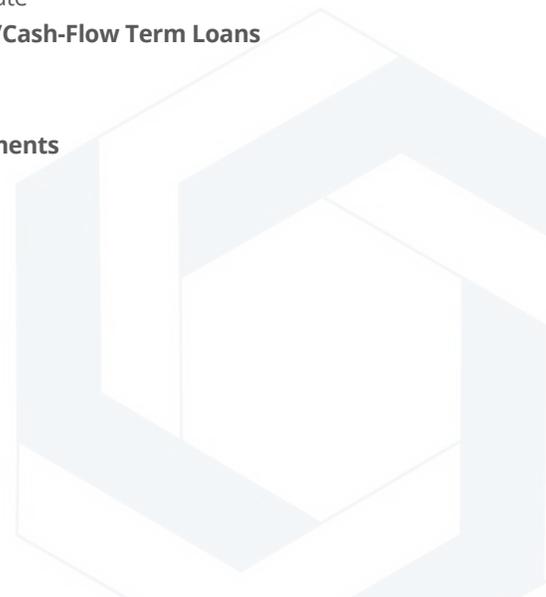
UNITRANCHE STRUCTURES

We favor a unitranche type structure with co-investment from our funds to maximize funding amounts and minimize cost. We often combine senior and subordinated debt into one loan for cost savings, convenience of underwriting, and speed to close.



LOAN TYPES

- **Asset-Based Revolving Lines of Credit**
 - Accounts Receivable
 - Inventory (Wholesale and Retail)
 - Purchase Orders
- **Asset-Based Term Loans**
 - Machinery and Equipment
 - Intellectual Property
 - Commercial Real Estate
- **Subordinated Debt/Cash-Flow Term Loans**
 - Cash Flow
 - Criticized Assets
- **Debt Private Placements**
 - Debentures/Debt

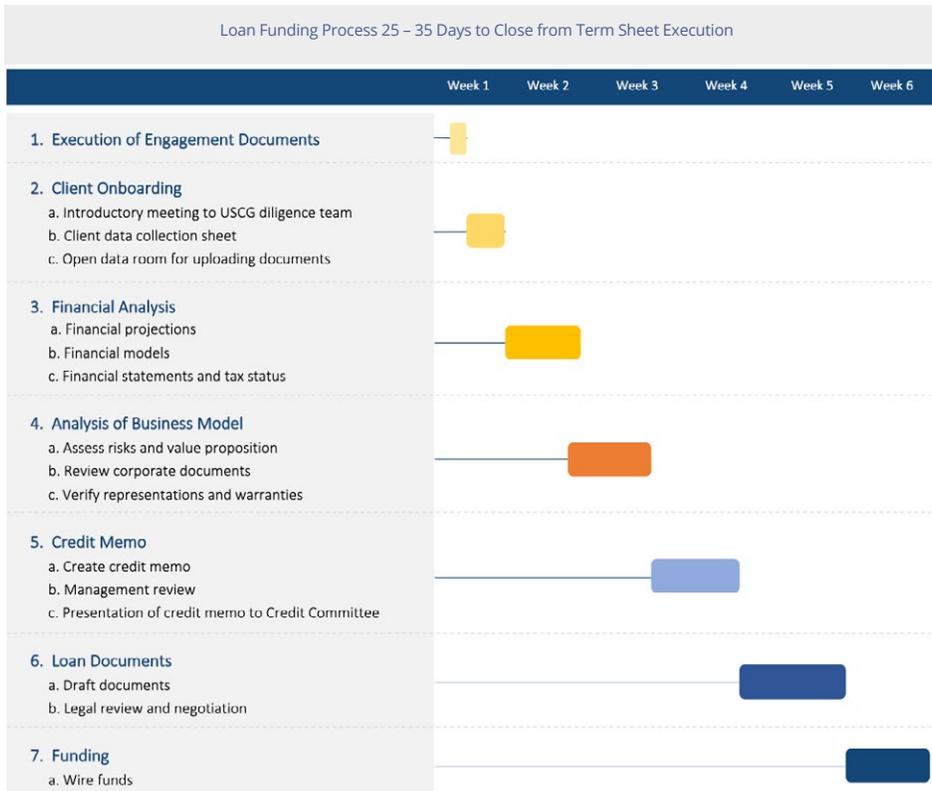


TYPICAL STRUCTURES FOR SENIOR OR SUBORDINATED LOANS

- **Senior Loan Size:** \$5,000,000 to \$500,000,000
- **Subordinate/Junior Loan Size:** \$3,000,000 to \$50,000,000
- **Company Type:** Private Companies or Publicly Traded
- **Location:** US and Worldwide

FINANCING SITUATIONS

- Growth/Hyper-Growth Capital
- Working Capital
- Refinancing
- Dividend Recapitalization
- M&A
- Bridge Loans
- Distressed/Turnaround



LENDING PROCESS

Clients are frequently locked into an inappropriate financial structure. US Capital can efficiently examine every aspect of a business and offer management a choice of the best available pathways to optimal financing. Having both principal capital and detailed, specialized knowledge of the marketplace allows US Capital to create financing solutions tailored to the specific needs of its clients.

FULHAM CO., INC.
\$8 MILLION
UNITRANCHE

PACIFIC CONTOURS CORPORATION
\$10 MILLION
REFINANCING

ALTERNATIVE ASSET MANAGEMENT FIRM
\$100 MILLION
ADVISORY

MANIFESTO HOLDING PLC
UP TO £10 MILLION
TERM LOAN

LESS INSTITUTE
\$30 MILLION
FINANCING

EQUITY SOLUTIONS

US Capital has an extensive and broad network of private investors, institutional investors, and investment advisors who make equity investments from \$5,000,000 upwards in early and growth-stage companies. We reach our investor community in a variety of ways through our targeted equity campaigns. Our personal approach to our close investor relationships is complemented by very well-attended “road show” events to showcase our investment opportunities. We utilize the latest in securities Reg-Tech to digitally showcase investments on our custom offering platform, and widely advertise those same offerings through conventional high-impact PR and marketing, as well as social media. All securities are offered by US Capital Global Securities, LLC, a member of FINRA and SIPC.

DISTRIBUTION OF PRIVATE PLACEMENTS

Personal Investor Outreach: US Capital has strong relationships within its Wealth Management client base, with many clients interested in private placements. We screen investment opportunities and reach out to investors to present these opportunities to interested parties who are active. We regularly utilize CUSIP numbers for our investments, which makes them easily available to investment advisors nationwide on most of the clearing and custody platforms and the self-directed retirement custodian sites.

General Advertising: We utilize Reg-Tech for expanded distribution of our private placement offerings, allowing us to advertise offerings through social media and general press releases. There are tens of thousands of investors engaged through our weekly newsletter, which showcases our offerings.

Digital Investment Platform: US Capital meets the needs of businesses and projects seeking capital (issuers) by offering their securities to investors in the United States and globally on a proprietary FinTech investment platform, managed by affiliate US Capital Global Securities. Investor engagement is tracked and reported to our investment professionals for personal follow-up. Learn more at uscgs.com.

Targeted Investor Campaigns: In addition to our general advertising campaigns, we leverage knowledge discovery in databases using our own very large investor database as well as a number of third-party proprietary investor databases for institutional investors and family offices that have previously invested in similar offerings. Because we are able to generally solicit with our offerings, we reach out to potential investors through phone calls, social media, and email campaigns. We track interest and engagement using our marketing analytics.



Investor Events and Road Shows: US Capital offers traditional roadshow-type, one-on-one meetings and investor meet-up conferences, bringing together pools of potential investors across the United States, as well as in Europe and Asia. These events showcase a particular offering with lively exchanges between the issuer and investors, usually in an engaging setting and accompanied by entertainment. US Capital has tens of thousands of investors and investment advisors it communicates with weekly regarding its investment opportunities.

EQUITY SITUATIONS

- Growing a business to the next level
- Funding an add-on acquisition
- Achieving substantial liquidity
- Effecting a partial change of ownership
- Consolidating multiple ownership interests, such as inactive shareholders
- Early-stage private and commercial note-holder payoffs
- Other growth initiatives
- \$5,000,000 to \$50,000,000 and more
- Common, preferred, or convertible note offerings
- SPV structures for accommodating many smaller investors

It can take at least 12 weeks for the first closing initial funds, though the process can proceed faster or slower depending on the company and investors.



* Dependent on region and type of offering.

PRIVATE CAPITAL ADVISORY SERVICES

In pursuing growth, small and medium-sized businesses must make important decisions relating to their capital structure. US Capital can help these enterprises at all stages from start-up to pre-IPO.

If a business decides to raise private equity capital, it will need to make sure the deal structure is appropriate for its specific needs, as well as those of its investors. In the early days of venture capital, entrepreneurs often gave up control of their company in exchange for their first investment funds. Now they have many more options, allowing them to create an optimal share structure for their enterprise.

US Capital provides its clients with strategic guidance and tactical advice on capital formation, structure, securities valuations, pricing, timing, and terms. The firm offers comprehensive financial advisory services for buy-side and sell-side engagements and for capital formation, including early-stage financings requiring debt or equity.

DIRECT EQUITY AND BRIDGE INVESTMENTS

US Capital Partners makes well-structured equity and bridge investments between \$1 million and \$50 million through its own family of private investment funds and vehicles. Managed by private investment and asset management firm US Capital Global Investment Management, LLC, these funds include a variety of private equity, venture capital, and business credit funds and customized strategies.

Equity investments can be used to meet a variety of objectives, including:

- Growing a business to the next level
- Funding an add-on acquisition
- Achieving substantial liquidity
- Effecting a partial change of ownership
- Consolidating multiple ownership interests, such as inactive shareholders
- Early-stage private and commercial note-holder payoffs
- Other growth initiatives

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

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



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

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



SELL-SIDE M&A REPRESENTATION

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

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

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



BUY-SIDE SERVICES FOR PRIVATE EQUITY GROUPS & CORPORATE DEVELOPMENT

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

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

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

EXPERIENCED MANAGEMENT TEAM



Jeffrey Sweeney
Chairman & CEO



Charles Towle
Managing Partner & COO



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



Frank Villarreal
Managing Director and
Partner



David Reinikainen
Vice President

PROJECT FINANCE, ACQUISITION FINANCE, EQUITY & DEBT



US Capital Global's real estate finance team delivers customized solutions across diverse sectors, encompassing both residential and commercial properties. With extensive proficiency in debt and equity financing, we support construction and completed projects globally, spanning industries such as energy, manufacturing, transportation, mining, hospitality, commercial, residential, entertainment, and more.

US CAPITAL GLOBAL FINANCING SOLUTIONS

Renowned for innovation, our experienced team excels in the full range of real estate financing products, facilitating seamless execution of large-scale and smaller transactions. Leveraging flexible financing options, including our own balance sheet, we ensure efficient attainment of your real estate financing objectives.

- Single-family
- Multi-family
- Hotels and Hospitality
- Office Conversion
- Storage
- Project Development Financing
- Industrial
- Healthcare
- Agriculture



EXPERIENCED MANAGEMENT TEAM



Jeffrey Sweeney
Chairman & CEO



Charles Towle
Managing Partner
& COO



Ish Spencer
Partner,
Corporate Finance



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



Steve Vargem
Vice President

REAL ESTATE FINANCING UNDER \$20,000,000:

Senior Loan Size:	\$5,000,000 to \$20,000,000
Subordinate/Junior Loan Size:	\$3,000,000 to \$20,000,000
LTC/LTV:	Up to 85%, depending on asset type
Interest:	Starting at SOFR + 4.5%
Time to closing:	As fast as 2 weeks depending upon asset type
Location:	US and select worldwide locations

REAL ESTATE FINANCING OVER \$20,000,000:

Senior Loan Size:	\$20,000,000 to \$1,000,000,000
Subordinate/Junior Loan Size:	\$20,000,000 to \$500,000,000
Equity Size:	\$20,000,000 to \$250,000,000
LTC/LTV:	up to 75%, depending on asset type
Interest:	Starting at SOFR + 3%
Time to closing:	As fast as 6 weeks depending upon asset type
Location:	US and select worldwide locations

EXAMPLE TRANSACTIONS UNDER \$20,000,000:

Visit our 'Transactions' website page and click on these tiles for further details.

 <p>MIRIS MIRIS €10,000,000 BRIDGE FINANCING</p>	 <p>LUXURY HOME DEVELOPER \$17.8 MILLION REFINANCING</p>	 <p>COMMERCIAL REAL ESTATE DEVELOPER \$15,000,000 ADVISORY</p>	 <p>LA QUINTA INNS & SUITES \$7 MILLION ADVISORY</p>	 <p>MANIFESTO HOLDING PLC MULTI-MILLION DOLLAR BRIDGE TO TERM LOAN</p>
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EXAMPLE TRANSACTIONS OVER \$20,000,000:

Visit our 'Transactions' website page and click on these tiles for further details.

 <p>THEME PARK DEVELOPER \$330 MILLION ADVISORY</p>	 <p>MULTI-FAMILY REAL ESTATE PROJECT \$52 MILLION FINANCING</p>	 <p>BLUETIDE PARTNERS HAMILTON, LLC \$25.5 MILLION FINANCING</p>	 <p>INTERNATIONAL AIRPORT DEVELOPMENT COMPANY \$220 MILLION ADVISORY</p>	 <p>TRISTATE REAL ESTATE INVESTMENTS, LLC \$200 MILLION ADVISORY</p>
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STRATEGIC PLANNING, BUSINESS PLAN WRITING, FINANCIAL MODELING, PROFORMA DEVELOPMENT, DUE DILIGENCE SERVICES, VALUATION, ADVISORY, FEASIBILITY STUDIES, AND RESTRUCTURING SERVICES

At US Capital Global Advisors we provide a complete suite of financial advisory services, including strategic planning, business plan writing, financial modeling, proforma development, due diligence services, valuation advisory, feasibility studies, and restructuring services. We pride ourselves on our ability to listen to our clients, understand their needs, and help them develop custom solutions to complex issues.

Our clients range from capital sources (brokers, commercial bankers, commercial real estate investors, family offices, investment bankers, private equity investors, and venture capitalists) and referral sources (such as accountants and attorneys) to private and public companies that are either seeking capital, need to work through complex opportunities, or require consulting services.



DUE DILIGENCE SERVICES

Using our unique Transaction Analysis™, we provide a due diligence punch list report driven by over 300 scored attributes. We serve our clients by applying a proven, analytic, and objective process for identifying the most relevant and high-value attributes of potentially successful enterprises. The Transaction Analysis encompasses a four-phase client-engagement and management process driven by a proprietary predictive and adaptive analysis system known as the TA Score™.



At US Capital Global Advisors, we are skilled at providing a custom Transaction Analysis focused on due diligence, following an in-depth analysis of all relevant due diligence attributes for each application. The resulting report is used to determine the feasibility of funding.

VALUATION ADVISORY

When companies, capital providers, or investors require an independent assessment of a valuation, they look to US Capital Global Advisors to stress test it. We help our clients address some of their most challenging valuation issues, ranging from strategic, transactional, and operational decisions through to compliance and monitoring. Our finance and accounting expertise, combined with the use and development of sophisticated valuation methodologies, can meet even the most exigent valuation needs.

FEASIBILITY STUDIES

We provide high-quality, thorough market and financial feasibility studies. Our customized feasibility services assist our clients in the decision-making process, as they determine how to proceed with a proposed project or venture. Our financial feasibility studies can evaluate the feasibility of new entities, the acquisition of an existing business, the introduction of a new product or business expansion, and much more. We always customize our studies to meet your unique needs.

When developing custom studies, we often address industry standard metrics including, but not limited to: Market Feasibility Studies, Industry Trends, Total Addressable Market (TAM), Serviceable Available Market (SAM), and Serviceable Obtainable Market (SOM). We may also determine Customer Acquisition Costs (CAC) and Key Performance Indicators (KPIs).



RESTRUCTURING SERVICES

Our workout and restructuring division understands the intricacies of corporate finance and has extensive practical knowledge and experience in unravelling the complexities of troubled projects and transactions, as well as the skill and innovation to solve problems. We are able to advise either lenders/creditors or borrowers/owners in connection with workouts of a wide variety of financing options, including bridge, permanent, construction, commercial, mezzanine, and asset-based loans. Special situations require tailored solutions to meet the needs of clients facing inflection points, which are initiated by capital structure or other liquidity/financial issues. Our goal is to turn distress into opportunistic scenarios. These services include litigation support and fiduciary advice, when applicable.

In addition, we are able to manage the relationship between the investor/lender and the company through our Management Services Agreements (MSA). The MSA gives clients access to their monthly updated TA Score, document updates as the business evolves, and several hours of Executive Management Team consulting per month. Investors, lenders, and clients have 24/7 access to all material and data through a secured banking standard cloud-based server.



Jeffrey Sweeney
Chairman & CEO



Charles Towle
Managing Partner & COO



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



David Reinikainen
Vice President

EXECUTIVE MANAGEMENT



JEFFREY SWEENEY

CHAIRMAN & CEO

The founder of US Capital, Mr. Sweeney has a strong entrepreneurial approach, which he has applied in the investment banking and equipment leasing arena for over 20 years. In 1998, Mr. Sweeney purchased the assets of US Capital Corporation, a small equipment leasing company. Changing the focus of the company to asset-based lending and investment banking, Mr. Sweeney grew the business to over \$4 billion in funding opportunities each year. Today, he oversees a growing network of affiliated companies under the US Capital flagship brand.



CHARLES TOWLE

MANAGING PARTNER & COO

Mr. Towle has helped grow US Capital into a leading private financial group for small and medium-sized businesses in the U.S. A structured funding and corporate finance specialist, Mr. Towle has over 15 years of business development, asset management, corporate finance, capital markets, and general business management experience. Prior to US Capital, Mr. Towle gained extensive entrepreneurial and investment experience, serving as a limited partner, financial officer, or board member of various investment and endowment funds and small and medium-sized businesses, both in the U.S. and abroad.



ISH SPENCER

PARTNER, CORPORATE FINANCE

Mr. Spencer is responsible for directing all aspects of US Capital's nationwide Corporate Finance business origination program, business development, underwriting of commercial loans, and client relationships. Mr. Spencer brings extensive multi-disciplinary experience to US Capital, including special expertise in particular verticals, such as healthcare, technology, and manufacturing. He oversees US Capital's deal teams at the group's San Francisco headquarters, made up of banking professionals, business analysts, and underwriters.



VANESSA GUAJARDO

CHIEF OF STAFF

Vanessa Guajardo is responsible for the successful coordination of all national and international marketing and PR activities at US Capital. She leads a dedicated global team and oversees all investor and industry events, with a focus on global business development and personalized investor relations. Ms. Guajardo has developed sophisticated FinTech and MarketTech strategies that have directly contributed to US Capital's ongoing international expansion.



CONTACT



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CHAIRMAN AND CEO



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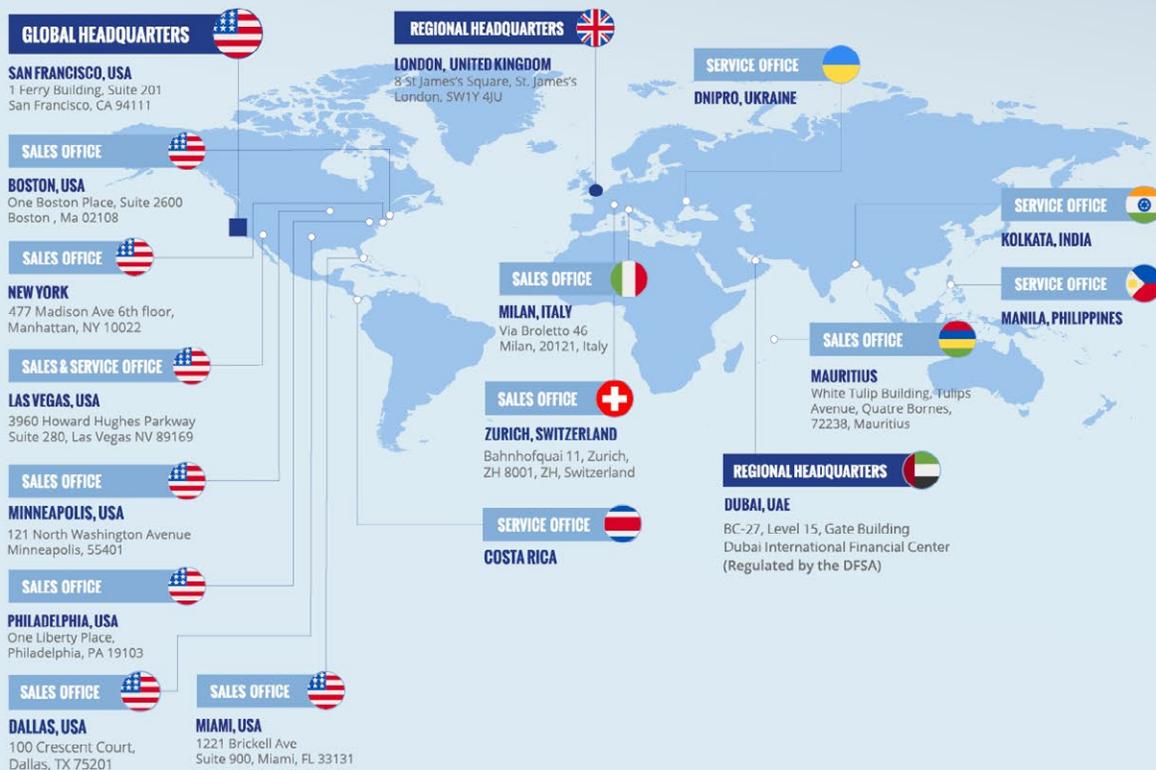
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