

# DealFlow 2009

## Facilitating Deal Flow Within Mezzanine & Junior Capital Financing in the Middle Market

Hear from 30+ Industry Experts!

### Finding & Funding the Deal

- ✓ Separating the diamond from the dust
- ✓ Evaluation techniques and strategies to optimize ROI
- ✓ Assessing the market verticals
- ✓ Funding partners: Where can I find them and how to attract capital?

### Partnering Strategies

- ✓ How to find the right partners for your deal flow?
- ✓ Strategically positioning your firm through effective marketing
- ✓ Dealmakers Break: An opportunity to find new partners right at the conference!

### Economic Keynote



**William Dunkelberg**  
Chief Economist  
**NATIONAL FEDERATION OF INDEPENDENT BUSINESS**  
Professor of Economics  
**TEMPLE UNIVERSITY**

### Hear from an Outstanding Faculty of Dealmakers



**Peter Buckley**  
Partner  
**WATCH HILL PARTNERS LLC**



**Thomas Spoto**  
Principal  
**ALPINVEST**



**Patrick N. W. Turner**  
Managing Director  
**TCW**



**Ted Koenig**  
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March 17-18, 2009  
New York, NY

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# DealFlow 2009

Hear from 30+  
Industry Experts!

Facilitating Deal Flow Within Mezzanine & Junior Capital Financing in the Middle Market

March 17-18, 2009 • New York, NY

Dear Colleague,

### If You Think You Know All There Is To Know, Think Again

Heading into 2009, investors are focusing on a great number of things – first among them is dealing with the current financial crisis and its impact on the credit markets. With the squeeze on, opportunities for mezzanine and junior capital financing have increased and the possibility of greater returns on investment has emerged.

### Getting the Deal Done in '09

While the opportunities for deal flow are growing, the realities must be addressed and that is the primary reason DealFlow09 is created so you, the investor, have the opportunity to learn from your peers and colleagues as to what the makes a deal work – and work successfully!

### At DealFlow 2009 You Hear:

- How to evaluate an opportunity to ascertain whether it is an advantageous investment
- Fundraising techniques that really work
- Which sectors will be the ones to look at for investment in '09 and beyond
- What does the LP, BDC and PE want in a deal and how you can position your firm to be the partner of choice
- Positioning your firm successfully to stand out from the pack
- And much more!

### Speakers, Networking & The Dealmakers Break

We bring together fund managers, private equity firms, BDCs and lenders. Hear from the leading firms working now in the middle-market area.

We know how important networking is to deal flow which is why we have set up **The Dealmakers Break** for **Thursday, March 18**. Unique to **DealFlow 2009**, it is our promise to create an opportunity for all attendees to interact, exchange business cards, and deal flow information. Open your Rolodex® as you meet others who are

looking for opportunities in several investment sectors. Areas will be set up for those interested in combining forces, raising capital and forging a deal. Also, many of the speaking faculty will be on hand to meet with you throughout the conference to speak individually about gaining a competitive advantage and building your business.

### In Two Days you get:

- ✓ 100% content dedicated to the art and science of the junior capital deal
- ✓ Expert sessions from leaders in the industry
- ✓ Real-world examples of deals made - and done successfully!
- ✓ An economic perspective of where the market is at now and where it is heading in the next 18 months

### DealFlow: Forging a Relationship

Join us this coming March as we bring you two valuable days of practical industry knowledge and networking opportunities with other fund managers, LPs, PEs, BDCs and others. We provide you with the knowledge and networking to arm you in establishing deal flow and competing in an ever-changing market. Please call 1-800-647-7600 to reserve your place now.

We look forward to meeting you in March!

Best,

Stacey Mankoff  
Event Director  
**DealFlow 2009**

## WHO WILL BE ATTENDING DEALFLOW 2009?

### From Mezzanine Funds, Private Equity Firms, BDCs and Hedge Funds:

- Partner
- Managing Partner
- Managing Director
- Investment Manager
- Principal

### From Senior Lenders and Second Lien Lenders with the titles of:

- Senior Vice President, Commercial Lender
- Executive Vice President, Senior Lender
- Senior Lender
- Senior Lender, Secondary Market Services

### DealFlow 2009 will also be of interest to:

Law Firms • Accounting Firms • Business Consultancies • Business Investigations Companies • Rating Agencies

## DAY ONE • Tuesday, March 17, 2009

8:00 Registration Opens

9:00 Chairperson's Opening Remarks



**Jay Schiff**  
Managing Director  
PROSPECT CAPITAL

### 9:15 Tracking the Deals: Opportunities in the Middle Market

- What deals are getting done?
- Asset rich companies
- Companies with EBITDA over \$10mm
- What deals are senior debt providers looking for?
- Rates are up, leverage is down

- OIDs and prepayment penalties with teeth are the norm
- How has the role of Mezzanine debt expanded and what you should expect for future deals
- Warrants are back for many deals
- Mezzanine providers are flush with cash – will it last?

**Peter Buckley**  
Partner  
WATCH HILL PARTNERS LLC

### 10:00 Economic Keynote: How the State of the Current Economy Impacts Deal Flow in the Middle Market Sector and Beyond

The fourth quarter of 2008 has been the most volatile time in the financial markets seen in decades. With a new administration in place and new regulations being evaluated and implemented, what are the

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ramifications for the mezzanine and junior capital finance? Giving their perspectives, our economists give a view of the current state of the credit markets and what challenges as well as opportunities lay ahead.



**William Dunkelberg**  
Chief Economist  
NATIONAL FEDERATION OF INDEPENDENT BUSINESS  
Professor of Economics  
TEMPLE UNIVERSITY

10:45 *Networking Break*

### 11:15 **The Deal: How Big of a Deal is Feasible in Today's Junior Capital Market and How Can You Benefit in the Current Market?**

Opportunities seem to abound in today's mezzanine in junior capital market. But are these deals truly worthy of the time, effort and expense? How do you select the right deal for right now and how big of a deal is actually doable in today's environment? In this panel, we discuss today's deal-making climate and what tactics are used to position their funds to generate the returns that investors are looking for.



**Thomas Spoto**  
Principal  
ALPINVEST



**Patrick N. W. Turner**  
Managing Director  
TCW



**Ted Koenig**  
President & CEO  
MONROE CAPITAL



**David Blair**  
Partner  
PNC MEZZANINE CAPITAL

### 12:00 **The Anatomy of a Deal: Selection, Analysis and Execution**

Private equity firms have been battered most recently by the financial meltdown. The number of troubled companies continues to grow, some due to the current economics, others to more internal issues. It is now more critical to examine the terms of the deal than ever before and also know what you are getting yourself into. It is imperative to select the companies that can be turned around and turned around successfully. The due diligence must be performed as well as examination of loan covenants, inter-creditor agreements and debt restructuring terms as you work with the acquired companies. Being forewarned and forewarned allows you to reduce the risk. In this session our speakers brings their own experiences to discuss what evaluation terms to use in a tricky financial environment. In this panel hear how some seasoned investors look for deals and what makes them ultimately pull the trigger to move ahead



**Stuart Davies**  
Managing Director  
SANKATY ADVISORS



**Michael J. Hall**  
Managing Partner  
YUKON PARTNERS



**D. Scott Lutzke**  
Founding Partner  
CENTERFIELD CAPITAL PARTNERS

12:45 *Luncheon for Speakers & Attendees*

### 2:00 **Striking an Advantageous Pricing Structure Deal When Financing in Junior Capital Panel**

Pricing structure: Everyone is talking about it but how is everyone pricing deals? There are different schools of thought on this and in our roundtable discussion; we address the most current areas including:

- Blurred lines: Banks, Mezzanine lenders and 2nd lien – where do each go to get the right pricing package
- Is there more opportunity now for better pricing? Have terms gotten better?
- Analyzing pricing of securities and transaction to determine your ROI

*Panel Facilitator:*



**Robert Ammerman**  
Managing Partner  
CAPITAL RESOURCE PARTNERS



**Gerald Chaney**  
Principal  
ICG AMERICA

**Todd Hearle**  
Managing Director  
GUGGENHEIM PARTNERS



**Steven V. Ruby**  
Principal  
AUDAX



**Jay Schiff**  
Managing Director  
PROSPECT CAPITAL

### 2:45 **Ensuring that I's are Dotted and T's are Crossed: The Importance of Documentation in the Deal**



**Charles J. Morton, Jr.**  
Partner  
VENABLE LLP

3:15 *Afternoon Networking & Refreshment Break*

### 3:45 **Case Study: How a Deal Was Germinated, Worked Through and Developed**



**David A. Gezon**  
Senior Managing Director  
MIDWEST MEZZANINE FUNDS

### 4:15 **Understanding the Difference between Preferred and Private Equity and How That Would Benefit a Deal**

Preferred equity acts as a mezzanine but guarantees the shares vs. guaranteeing just the assets themselves. With preferred equity, you get a hybrid of true mezzanine and sponsored equity. With this definition, what are the opportunities for the junior capital player? And what advantages will you receive by taking a stake as a preferred rather than a private equity partner?

**Wil Green**  
Senior Member  
PROTEUS CAPITAL

4:45 *Day One Concludes*

## DAY TWO • Wednesday, March 18, 2009

8:00 *Continental Breakfast*

9:00 *Chairperson's Remarks*



**Ron Kahn**  
Managing Director  
LINCOLN INTERNATIONAL LLC

### 9:15 **Private Equity, Fundraising and Identifying Investment and Partnering Strategies for Successful ROI**

Through 2008, there was a growing interest and focus on mezzanine and junior capital opportunities in the middle-market. Will the money continue to be there for new funds for investment? What does it really take to raise new money and what strategies will need to be applied grow business? This session brings together a panel of experts who discuss the ins and outs of fundraising and how to adapt your current tactics to today's market.

*Panel Facilitator:*



**Alan B. Roth, Esq.**  
Partner  
WILDMAN HARROLD LLP



**Stuart Davies**  
Managing Director  
SANKATY ADVISORS



**Eric Albertson**  
Senior Director  
STANDARD LIFE



**David Colla**  
Vice President  
OAKTREE MEZZANINE



**Michael J. Revord**  
Managing Partner  
ALDINE CAPITAL FUND LP

## 10:15 Deal Flow From Abroad: Examining Global Investment Opportunities with A Case Study from the Asian Market

In the summer of 2008, the U.S. signed its second largest Free Trade Agreement (FTA) in history with South Korea (Korea). Korea is now the 10th largest economy globally and is the 7th largest U.S. trading partner and it is reasonable to predict that US/Korea investments could nearly quadruple over the next ten years. Through a case study presentation of one of PINTORESCO's engagements we walk through the specifics of one opportunity, which also let's us examine trends in this market space as a whole.



**Joel Peterson**  
Managing Partner & CEO  
PINTORESCO PARTNERS, LLC

## 10:45 The DealMakers Break

Unique to **DealFlow 2009**, this is a one-of-a-kind opportunity for all attendees to interact, exchange business cards, and deal flow information. Open your Rolodex® as you meet others who are looking for opportunities in several investment sectors. Areas will be set up for those interested in combining forces, raising capital and forging a deal.

## 11:45 Finding New Funding: Identifying Investor Opportunities Beyond the Mainstream for Your Mezzanine/Junior Capital Fund

The challenges of funding are known to many as are the usual suspects in this finance area. But identifying those not on the widely-viewed radar is another area of potential capital raising and honing in on those in this sector reveals a new source for opportunity and growth. In this session we bring together experts in the area of identifying and targeting non-traditional capital resources, including entrepreneurs and boutique investment banks, and discuss:

- Selecting, qualifying and recruiting the high-quality investor/entrepreneur
- Tactics for positioning your business opportunity strategically and attractively to the non-traditional investor
- All in the family: How the family office could be an investor and the family-owned business could be a consumer
- Uncovering the opportunities in the middle market that align with the non-traditional investor's requirements



**Phillip Krall**  
Managing Director  
GLEACHER FUND PARTNERS



**Benjamin Oehler**  
President  
BESHAW GROUP

**Eric Rogoff**  
Partner  
FALCON INVESTMENT ADVISORS

*Managing Partner*  
KEY PRINCIPAL PARTNERS

## 12:15 The State of the Middle Market: More Growth or Flatlining?

Identifying opportunities is the lifeblood of any financing operation. With the economic situation being what it is, where will the new areas of growth be? Will there be more opportunities in the distressed market? Will mezzanine continue its growth or will the deals start petering out? Is there another area of junior capital financing growth we should be examining? There is much speculation and much is unknown but all – will it be in the distressed market? Mezzanine? Or in other junior capital financing? This session discusses the future of the all important deal flow.

*Panel Facilitator:*



**Ron Kahn**  
Managing Director  
LINCOLN INTERNATIONAL LLC



**Darl Petty**  
Managing Director  
CAPITAL POINT



**Thomas F. Campion**  
Managing Director  
MERIT CAPITAL PARTNERS



**Ward Mooney**  
Executive Managing Director  
CRYSTAL CAPITAL

1:00

Luncheon for Speakers & Attendees

## 2:00 How to Stand Out: Positioning Your Firm Successfully to Achieve Greater Opportunities in the Middle Market

There is tremendous competition for deals in today's market and the intensity is only going to grow exponentially. Differentiating your firm from the others is critical but how do you accomplish this task? In session we discuss tactics including:

- Successful strategies on building a network and promoting your firm
- Differentiation by focus, deal flow, post-acquisition
- Maximizing your outbound effort with software, technology and marketing strategies
- Getting the word out effectively about your firm
- Cost effective market techniques: Gaining the greatest ROI for your marketing initiatives

**Scott Gold**  
Principal  
BNY MEZZANINE  
**Jeri J. Harman**



**Mark Jones**  
Managing Director  
RIVER ASSOCIATES

## 2:30 What Do the LPs Want: Addressing the Long Term Expectations of the Limited Partners for Better and Growing Relationships

- Examining the LP perspective on the return opportunities for their investments in junior capital funds?
  - Changes in risk-adjusted returns
  - Expectations for long-term returns and identifying future needs
- Allocating strategies among the different funds of junior capital – how to diversify
- Identifying opportunities in funds focused on junior capital



**Megan Leary**  
Investment Manager  
ALPINVEST



**Rory M. Cohen**  
Partner  
VENABLE LLP

## 3:15 Evaluating Middle Market Financing Opportunities: Will Mezzanine and Junior Capital Go the Way of the Second Lien Market?

- State of the current market and the lack of senior debt
- Is it the end of the second lien market?
- Will mezzanine and junior capital players have senior debt capabilities?
- Other options in financing

**Ron Kubick**  
Senior Managing Director  
TYGRIS

**Jason Anderson, CFA**  
Director, Debt Capital Markets  
BANK OF IRELAND

4:00

**DealFlow 2009 Concludes**

Thank You to our **DealFlow 2009** Advisory Board and their contribution to the content of the conference:

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Principal  
BNY MEZZANINE



**Jay Schiff**  
Managing Principal  
PROSPECT CAPITAL



**Robert Ammerman**  
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