



iGlobal Forum

# The Independent Sponsors Summit Overview **2024**



# Welcome

Exclusively designed to connect Independent Sponsors and Capital Providers, all laser-focused on getting deals done.

The independent sponsor marketplace is one of the most rapidly developing areas in U.S. private equity today. Independent sponsors offer more value, control and discretion than the traditional private equity model; and they have shorter lock-in periods and higher flexibility.

## iGlobal Forum's year-round calendar of events brings you:

- 1. The perfect environment for relationship building and deal making** - Our friendly and business-focused vibe makes this the go-to event for you to connect with the people you need to meet to drive deal activity.
- 2. 1-1 meetings and small group discussions** - Our curated audience of 350 key industry players, and our highly interactive agenda, mean you can be an integral part of important industry discussions with your most respected peers.
- 3. The insights you need to win more deals** - Hear how you can gain a competitive edge by optimizing your tax structures and deal structures, and by implementing top value creation strategies.

We look forward to meeting you at an event soon!

## Save the date

- 17th Independent Sponsors Summit** | SEPTEMBER 17-18, 2024 | NEW YORK
- Independent Sponsors & Capital Provider Dealmakers Meeting** | DEC 4, 2024 | NEW YORK
- 18th Independent Sponsors Summit** | MARCH 4-5, 2024 | MIAMI
- Independent Sponsors & Capital Providers Dealmakers Meeting** | APRIL, 2025 | NEW YORK
- Independent Sponsors & Capital Providers Dealmakers Meeting** | JUNE, 2025 | CHICAGO
- Independent Sponsors & Capital Providers Dealmakers Meeting** | DECEMBER, 2025 | NEW YORK

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# Hear About the Event



**IGLOBAL FORUM**  
WE INVITE YOU TO CONNECT.

# Our Advisory Board

iGlobal Forum events are created by the industry, for the industry. Our Advisory Board plays a major role in shaping the content to ensure our events deliver the answers to current issues and offer long term insight.

## Special thanks to our advisory board members



**James Illikman**  
Partner  
**Peninsula Capital  
Partners**



**David Acharya**  
Managing Partner  
**Acharya Capital  
Partners, Llc**



**Tony Brindisi**  
Managing Partner  
**Rtc Partners**



**Nick Russell**  
Managing Partner  
**Tuckerman  
Capital**



**Christopher Sheeren**  
Partner  
**LONGHOUSE  
PARTNERS, LLC**



**Evan Gallinson**  
Managing Director  
**MERIT CAPITAL  
PARTNERS**



**Claudine Cohen**  
Managing Principal &  
Leader, Transactions &  
Turnaround Advisory  
**COHNREZNICK**



**Jeff Gonyo**  
Managing Director  
**GENEVA GLEN  
CAPITAL, LLC**



**Douglas Song**  
Managing Partner  
**PRODOS CAPITAL LLC**



**Sylvie Gadant**  
Partner and Practice  
Leader - Transaction  
Advisory Services  
**CITRIN COOPERMAN**



# Our Audience

iGlobal Forum events are attended by senior level dealmakers from the capital markets and independent sponsors.

**1700+**  
Delegates

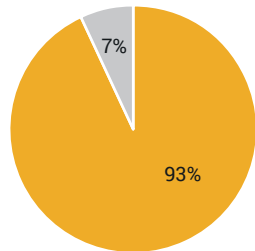
**30+**  
Sponsors

**20+**  
Media

**180+**  
Speakers

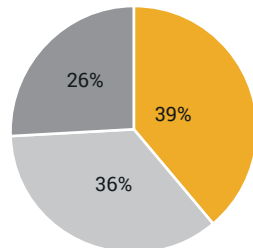
## Attendees Breakdown

Job Title



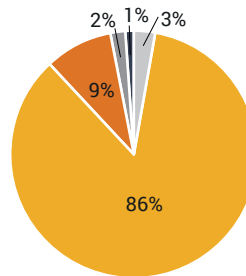
■ C-suite  
■ Investment Analysts

My Role



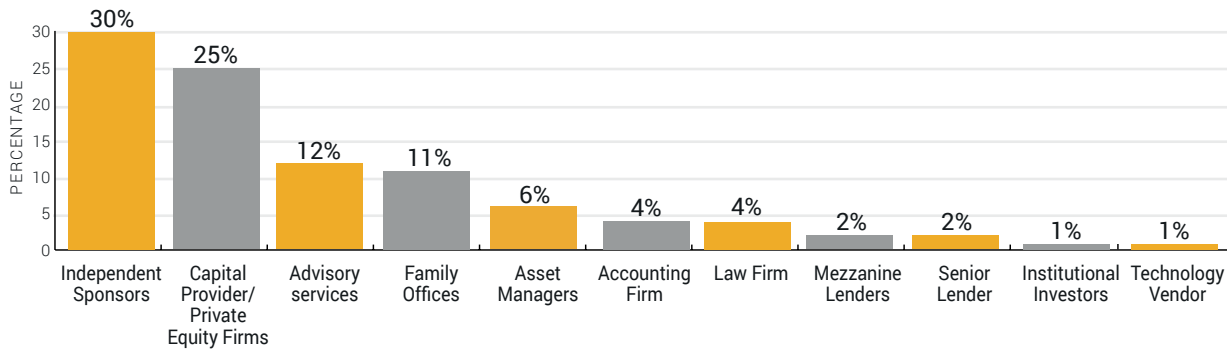
■ Seeking Capital  
■ Providing Equity Capital  
■ Providing Debt Capital

Investment Size



■ \$1M - \$100M  
■ \$100M - \$500M  
■ Up to \$1M  
■ \$500M - \$1B  
■ Over \$1B

Company Type



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# Testimonial



"I have been here for all eight years. What I come back for is just the quality of people who I meet."

**David Acharya, Managing Partner, Acharya Capital Partners, LLC**



"This is one of the few forums where everyone can come together in one spot."

"I would absolutely tell people to come particularly folks in my shoes that are trying to develop their network of capital providers and also trying to meet other independent sponsors."

**Nick Barker, Partner, Longhouse Partners**



"We've met some interesting people who we hope to transact with, and we've also met some potential investors. It's a central meeting place where people are coming from a variety of locations."

**Ahmed Fattouh, Founder and CEO, Interprivate**



"We love this conference, we will be back next year. I tell them that every year, it's been really phenomenal."

**Sylvie Gadant, Partner, Citrin Cooperman**



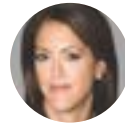
"Is a really good mix of Capital Providers and independent sponsors. Interesting topics but also high-quality attendee base."

**Nikolas Miller, Director, Prudential Private Capital**



"The great turnout always leaves me with new value-add relationships so I can grow my deal flow."

**Douglas Lancey, Tamarix Capital Partners**



"Everything from accounting firms to the lawyers, to the private equity firms and independent sponsors, it's a really great place for you to meet some folks who are within your ecosystem. The content here at this conference is really super, I think the presenters are really super."

**Nanette Heide, Partner, Duane Morris**



"This is a great forum to meet both independent sponsors but also more so capital providers."

**Lenore Kopko, Managing Director, Artemis Capital**



"There's a lot of really significant players who are actively doing deals in the industry. Being top of mind and seeing them is really valuable for us as a law firm."

**Chase Stuart, Partner, Ice Miller**



"This conference has been eye-opening."

"I will continue to be a repeat participant in iglobal but mostly because it's got the right people."

**Tarrus Richardson, CEO, IMB Development Corporation**



"An efficient, affordable way for independent sponsors and capital providers to build meaningful relationships and learn about industry developments."

**Paul Shufro, Greyrock Capital Group**



"The well-structured sessions and networking consistently uncover potential partners, making this event a valuable platform for our business development."

**Paul Oris, Tecum Capital**

# Our Expert Speakers



**Grant Kornman**  
Partner  
Align Collaborate



**Mark Sinatra**  
Chief Executive Officer  
Aspen HR



**Rob Bauer**  
Managing Member  
Bassett Creek Capital



**Grant Kornman**  
Partner  
Align Collaborate



**Mark Sinatra**  
Chief Executive Officer  
Aspen HR



**Rob Bauer**  
Managing Member  
Bassett Creek Capital



**Peter Shelton**  
Partner  
Benesch Law



**Ignacio Macias**  
CEO  
CECOP USA



**David Zawitkowski**  
Partner, Transaction  
Advisory Services Practice  
Citrin Cooperman



**Claudine Cohen**  
Managing Principal,  
Value360 Practice  
CohnReznick



**Jason Duzan**  
Founder  
Colfax Creek



**Steve Altman**  
Partner  
Cornerstone Capital Partners



**Darien K. Smith**  
President  
D.K. Smith & Co.



**Burt Francis**  
Managing Director  
ECA Partners



**Steven Haug**  
Director  
ECA Partners



**Robert Puopolo**  
Partner  
Epic Partners



**Rick Perkal**  
Managing Partner &  
Chief Executive Officer  
Firelight Capital



**Brinda Yohannan**  
Managing Director  
First Haven



# Our Expert Speakers



**Drew Brantley**  
Managing Director  
Frisch Capital Partners



**Michael Lonergan**  
Managing Partner  
Georgia Oak Partners



**Sam Snyder**  
Managing Partner  
Greyrock Capital Group



**Clifford Meijer**  
Partner  
Headway Capital Partners



**Kevin Christmas**  
Partner  
Holland & Knight



**Tom Kesoglou**  
Chair of Private Equity Practice  
Ice Miller



**Brad Burke**  
Private Capital Advisor  
Insperty



**Emily Hak**  
Managing Director  
Insperty



**Nick Jean-Baptiste**  
Founding Partner  
Jacmel Partners



**Nick Barker**  
Partner  
Longhouse Partners



**Liddy Karter**  
Managing Partner  
Mizzen Capital



**David Eshaghian**  
Managing Partner  
Panther Equity Group



**James Illikman**  
Partner  
Peninsula Capital Partners



**Chris Lee**  
Managing Partner  
RTC Partners



**Tony Brindisi**  
Managing Partner  
RTC Partners



**Bryan Rand**  
CEO  
Rand & Co



**Eddie Otocka**  
Senior Managing Director  
STNL Advisors



**Paul Marino**  
Partner  
Sadis & Goldberg LLP



# Our Expert Speakers



**Caroline Kung**  
Managing Partner  
SagePath Capital



**Jonathan Barnes**  
Managing Director  
Star Mountain Capital



**Rob Kissling**  
Principal  
Source Capital



**Brandon Pettagru**  
Director  
Stonehenge Capital



**Jay Sprague**  
Principal  
Tamarix Equity Partners



**Eric Taylor**  
Founder, CEO & CIO  
Trident



**Jonathan Saltzman**  
Managing Partner  
Torque Capital Group



**Nick Russell**  
Managing Partner  
Tuckerman Capital



**Rodney Reisdorf**  
Co-Founder & CEO  
Verivend



**Andrew Ferworn**  
Partner  
Virtus



**Vinay Bachireddy**  
Partner  
Weave Growth



**Judd Kohn**  
Managing Director  
White Wolf Private Credit

# Independent Sponsor Awards

The awards honor the entrepreneurial spirit and exceptional skills demonstrated by Independent Sponsors and Capital Providers in crafting some of the industry's most groundbreaking deals.

## Congratulations to the 2024 Winners!

### Lifetime Achievement Award

**Bruce Lipian**

Managing Director, StoneCreek Capital

**Drew Adams**

President, StoneCreek Capital

### Capital Provider of the Year

**James Illikman**

Partner, Peninsula Capital Partners

### Diversity ESG Award of the Year

**Nick-Jean Baptiste**

Managing Partner, Jacmel Growth Partners

### Deal of the year

**David Acharya**

Managing Partner, Acharya Capital Partners

### Independent Sponsor of the Year

**Tony Brindisi**

Managing Partner, RTC, LLC

**Christopher Lee**

Managing Partner, RTC Partners

### Emerging Independent Sponsor

**Kenneth Mill**

Managing Partner, Monroe Street Partners

For more information on how you can sponsor the 2025 awards, please contact Roger Kowalski  
[roger@iglobalforum.com](mailto:roger@iglobalforum.com)

### SPONSORS:



# Independent Sponsor Awards





# Hear about getting involved as a sponsor



**IGLOBAL FORUM**  
WE INVITE YOU TO CONNECT.

# With thanks to our amazing Sponsors for their support





## We connect people better through our Brand Promise:

At iGlobal Forum we deliver tangible and measurable outcomes that directly contribute to the success and growth of clients. With our commitment to excellence backed by our Risk-Free policy, we guarantee your satisfaction.

**iGlobal Forum** specializes in exclusive senior-level forums focused on today's most significant business issues. We offer a platform for business connections, education, and advisory services for leading Fortune 1000 companies and industry practitioners. Our events are attended by selected corporate CEOs, senior management, business entrepreneurs, as well as representatives from non-profit and government organizations. We enjoy the participation of large institutional investors, asset managers, hedge funds, private equity, venture capital, investment banks, consultants, and law firms. Please visit [www.iglobalforum.com](http://www.iglobalforum.com) for more information about our company.