



iGlobal Forum

The Independent Sponsors Summit Overview **2023**



iGlobal Forum

Welcome

Exclusively designed for Independent Sponsors and Capital Providers.

The independent sponsor marketplace is attracting a growing number of professionals due to the increasing investor demand and the challenges of raising private equity funds today. It remains one of the hottest topics in the U.S. private equity scene. Independent sponsors offer more value, control, and discretion than the traditional private equity model. They also have shorter lock-in periods and the flexibility to make investment decisions on a deal-by-deal basis.

Whether you're a new entrant or an established player, our events provide valuable insights, help establish relationships, meet valuable new contacts, evaluate potential business endeavors and generate fresh deal flow.

Since 2015, our bi-annual Independent Sponsors Summit and quarterly Independent Sponsors & Capital Providers Dealmakers Meetings provide the perfect platform to meet and connect with senior-level capital providers and leading independent sponsors. Network and learn from industry experts, and source new deals.

We look forward to meeting you!

Save the date

Independent Sponsors & Capital Provider Dealmakers Meeting | JUNE 15, 2023 | CHICAGO

15th Independent Sponsors Summit & Golf Outing | SEPTEMBER 12-14, 2023 | NEW YORK

Independent Sponsors & Capital Provider Dealmakers Meeting | DEC 6, 2023 | NEW YORK



Join us for the 15th Independent Sponsors Summit Golf Outing on September 12th!

The golf outing specifically designed for independent sponsors and capital providers will take place at Pelham Country Club, located just 30 minutes from Manhattan in the picturesque village of Pelham Manor.

With only 72 spots available (18 Foursomes), make sure to book your place early to secure your spot. Build valuable connections and expand your network through this exclusive gathering that will bring together capital providers and independent sponsors in each Foursome.

Sponsorship Opportunities

Showcase your brand to the key players of independent sponsors and the capital providers community. Become a sponsor and don't miss out on the chance to maximize your visibility and connect with potential clients and partners.

For more information and to discuss a bespoke package, email Roger Kowalski at roger@iglobalforum.com

iGlobal Forum 15th Independent Sponsors Summit

GOLF

◆◆ OUTING ◆◆

Schedule

10:30 am - 12:00 pm - **BRUNCH & NETWORKING**

12:15 pm - **RULES & SHOTGUN START**

Followed by: **COCKTAIL HOUR, RECEPTION & AWARDS!**

7:00 pm - **EVENT CONCLUSION**

Organize Your Own Get-together

Want more networking?

We're introducing a new and unique opportunity for you to host your own networking event at the 15th Independent Sponsors Summit & Golf Outing.

Get-togethers are organized, run and hosted networking events independently that take place around the main conference. From breakfast meetups to VIP dinners, Organizing your own Get-together provides a unique opportunity for attendees to connect with like-minded professionals and build meaningful relationships.

How can you host a Get-together?

Hosting a Get-together is a breeze! Simply decide what type of event you'd like to host, whether it's a breakfast meetup, VIP dinner, or happy hour. Then, book the logistics necessary to make your Get-together a success. Once you have all the details ironed out, simply submit your event information to us via this form. Our user-friendly platform and process make it easy for attendees to RSVP to Get-together events.



What are the benefits of hosting a Get-together?

- Showcasing your brand and expertise to a targeted audience
- Building meaningful professional relationships with attendees
- Providing a unique and memorable experience for attendees

Want some Get-together ideas?

- The possibilities are endless! Here are a few ideas to get you started:
- Breakfast briefings or Dinners with guest speakers or VIPs in unusual venues
- Power walk or morning jog
- Happy hours or wine/whiskey/chocolate/cheese tastings

Don't miss out on this opportunity to make a lasting impression and build valuable relationships at the 15th Independent Sponsors Summit & Golf Outing. Host your own Get-together and take your networking to the next level!

FIND OUT MORE!

* Restrictions: Please note that Happenings require prior approval to ensure that they align with the overall goals and vision of the summit and that they don't conflict with any of the main activities, such as the golf outing or breakfasts/cocktail/dinner times and to ensure that attendees are able to fully participate in all aspects of the summit. Additionally, only conference registrants are able to Host/RSVP for Happenings to maintain the exclusivity and targeted nature of these networking opportunities allowing attendees to connect with the right people and build meaningful relationships.

Hear About the Event



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.

Our advisory board members include:



Bruce Lipian
Managing Director at
StoneCreek Capital and
Co-Founder,
STONECREEK CAPITAL



Nick Russell
Managing Partner
**TUCKERMAN
CAPITAL**



David Acharya
Managing Partner
**ACHARYA CAPITAL
PARTNERS, LLC**



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

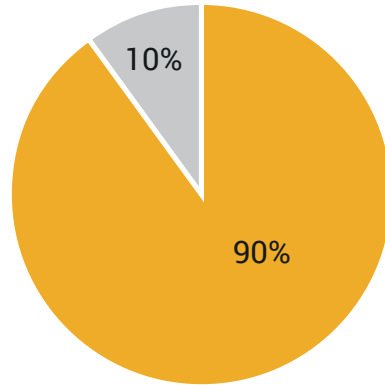
Audience Breakdown:

- > Independent Sponsors
- > Hedge Funds
- > Private Equity Firms
- > Institutional Investors
- > Family Offices
- > HNWIs (High Net Worth Individuals)
- > Mezzanine Lenders
- > M&A Intermediaries/Advisors



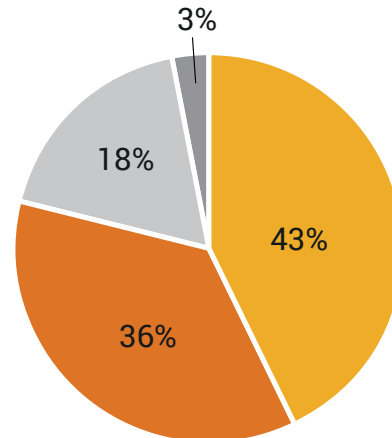
Our Attendees Breakdown

Job Title



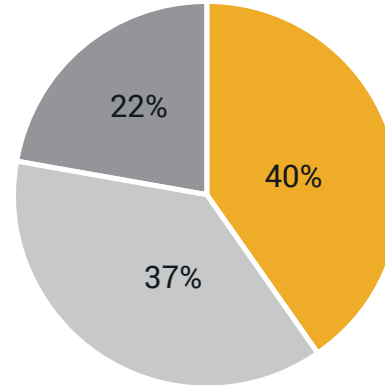
■ C-suite
■ Investment Analysts

I Am



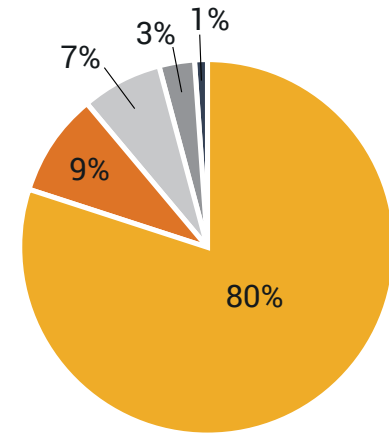
■ Independent Sponsor
■ Capital Provider
■ Service Provider
■ Both

My Role



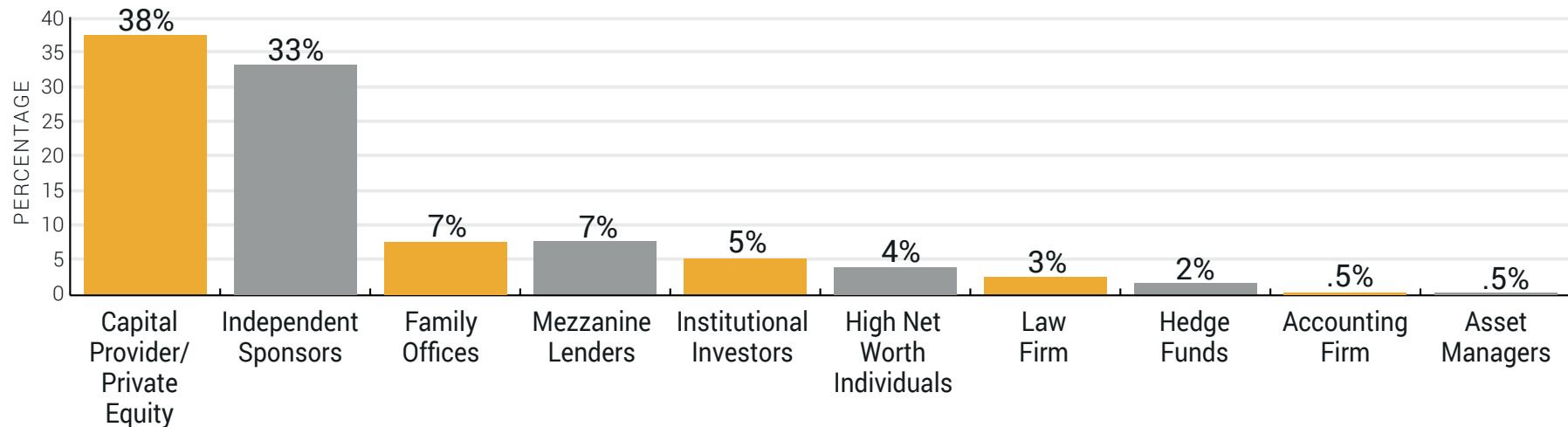
■ Seeking Capital
■ Providing Equity Capital
■ Providing Debt Capital

Investment Size



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

Company Type



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



"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

Our Expert Speakers



Faraz Abbasi
Partner
CENTERFIELD CAPITAL
PARTNERS



Jabbar Abdi
Managing Partner
SIDEREAL CAPITAL
GROUP, LLC



David Abner
Partner
DMA LAW



David J. Acharya
Partner
AGI PARTNERS LLC



Drew Adams
President
STONE CREEK CAPITAL



Omar Akbar
Partner & Managing
Director
APERION
MANAGEMENT



Christian H.M.
Albert
Managing Partner
BOWSIDE CAPITAL



Alex Allgood
Managing Director
VERIQUEST CAPITAL
MANAGEMENT, LP



Stephen Altman
Partner
CORNERSTONE
CAPITAL PARTNERS



Bob Anders Co-Founder
& Partner
PLEXUS CAPITAL



Mike Arguelles
Managing Director
STONEHENGE
PARTNERS



Daniel Arnold
Senior Vice President,
Business Development
HILCO GLOBAL



Thomas C. Aronson
Managing Director &
Principal
MONROE CAPITAL



Zubin Avari
General Partner
CHARTER OAK EQUITY



Raffi Azadian
CEO
CHANGE CAPITAL



Sean Baca
Managing Partner
Partner
CAISSON CAPITAL



Vinay Bachireddy
Founding Partner
WEAVE GROWTH
PARTNERS



Nick Barker
LONGHOUSE PARTNERS



John Bates
Partner
POTOMAC EQUITY
PARTNERS



Brad Batten
Partner
ZWICK PARTNERS



Rob Bauer
Managing Member
BASSETT CREEK
CAPITAL



Richard Baum
Managing Partner
CONSUMER GROWTH
PARTNERS



Michael Becker
Partner
PLEXUS CAPITAL



Steven Beckett
Partner
PENINSULA CAPITAL
FUNDS



Ryan Bell
Managing Director
BARINGS ALTERNATIVE
INVESTMENTS



Marc C. Bergschneider
Managing Member
STARBOARD CAPITAL
PARTNERS



Neel Bhargava
Founding Partner
NB GROUP INVESTORS
LLC



José Blanco
Managing Partner
CVF CAPITAL
PARTNERS



Chris Bordon
Partner
ICEMILLER



Drew Brantley
Managing Director
FRISCH CAPITAL
PARTNERS



Greg Bregstone
Partner
WOODLAWN PARTNERS



Brian Bristol
Managing Director &
Co-Founder NEW YORK
PRIVATE FINANCE



Jeffrey I. Brodlied
Partner
CENTRIPETAL CAPITAL
PARTNERS



Baron Carlson
Partner
AEA INVESTORS



Michael A. Carrazza
Chief Executive Officer
SOLAIA CAPITAL
ADVISORS LLC



Brendan Carroll
Senior Partner &
Co-founder VICTORY
PARK CAPITAL

Our Expert Speakers



Daniel Carter
CEO & Founder
WINDMILL
INVESTMENTS, LLC



Meredith Carter
President & CEO
EDGE CAPITAL LENDING



Nathan Chandrasekaran
Partner
Columbia River Partners



Kevin Christmas
Partner
Holland & Knight



Carty Chock
Co-Founder and Partner
CLEARPOINT
INVESTMENT
PARTNERS



Toure Claiborne
Founder & Managing
Member
KEARNEY PARK
INVESTMENTS



Claudine Cohen
Managing Principal
COHNREZNICK



Matthew Cohen
Principal
PRODOS CAPITAL
MANAGEMENT LLC



Paul Cohn
Managing Partner
TAIL END CAPITAL
PARTNERS



Julia D. Corelli
Partner
PEPPER HAMILTON LLP



Hannah Craven
Managing Partner
STONE-GOFF
PARTNERS



David J. Cunningham
Founder
VISIOCAP



Joshua Daitch
Managing Partner
SAJE CAPITAL



John Darguzas
Principal
MERIT CAPITAL
PARTNERS



James Darnell
Partner
KLH CAPITAL



Thomas Davenport
Founder & Managing
Partner
DAVENPORT CAPITAL
MANAGEMENT



Brad Deghand
Senior Risk Consultant
VIRTUS



Joseph M. DeLuca
Managing Director
EVERGREEN
INDUSTRIES



Benjamin deTar Wilhite
Co-Founder and Partner
CARUTH CAPITAL
PARTNERS



Max DeZara
Founder & Managing
Partner
AKOYA CAPITAL
PARTNERS



William E. Doran
Partner | Corporate
BENESCH
FRIEDLANDER COPLAN
& ARONOFF LLP



Charles J. Downey
Partner
FINN DIXON & HERLING



Patrick Dussault
Co-Chairman & CEO
NAMAKOR HOLDINGS



Yelena Edelstein
Deal Partner
BLACKMORE
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VALESCO INDUSTRIES



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Christopher B.
Eichmann
Managing Partner
PILLSMAN PARTNERS



Tom Ellis
Managing Member
THE ELLIS COMPANY



Richard Erickson
Co-Founder
RED OAK GROWTH
PARTNERS



David Fang
Managing Director
UNITY HUNT



Dan Farrell
Chairman & CEO
PRIVOS CAPITAL



Kevin Fechtmeyer
Managing Partner
CAVE CREEK CAPITAL



Daniel J. Foreman
Principal & Co-Founder
KINSALE CAPITAL
PARTNERS



Mark G. Fornasiero
Managing Partner
CLARENDON CAPITAL



Franklin Foster
Founder
Essex Bay Capital



Jay Freund
Partner
CANAL HOLDINGS

Our Expert Speakers



Burton Francis
Managing Director
ECA Partners



Robert Frisch
President
FRISCH CAPITAL
PARTNERS



John Fruehwirth
Managing Partner
ROTUNDA CAPITAL
PARTNERS



Sylvie Gadant
Partner and Practice
Leader
CITRIN COOPERMAN



Evan Gallinson
Managing Director
MERIT CAPITAL
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John Gardella
Shareholder
CMBG3 Law



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R. M. GOFF & COMPANY,
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Scott Gold
Managing Director
ARENA INVESTORS LP



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LLC



Chip Grace
Partner
MAY RIVER CAPITAL,
LLC



Kevin Griffith
Principal
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GROUP



Nitin Gupta
Partner
CASPIAN PRIVATE
EQUITY



Gerson Guzman
Managing Director &
CCO
CORINTHIAN CAPITAL
GROUP



Matthew Hagen
Founder & Managing
Partner
LEEWARD CAPITAL
MGMT



Tom Harbin
Managing Director
SOURCE CAPITAL



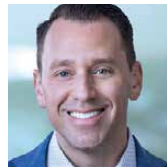
Emily Hak
Managing Director
Private Capital Markets
INSPIRITY



Jeri Harman
Managing Partner & CEO
AVANTE MEZZANINE
PARTNERS



Matthew L.T.
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Partner & Co-Founder
TECUM CAPITAL
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Vice President
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President and CEO
ACCORD FINANCIAL
CORP.



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Principal
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CAPITAL



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Founder & CEO
STAR MOUNTAIN
CAPITAL



Dave Hiemstra
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QUADEC PRIVATE
CAPITAL LLC



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COMPANY



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Partner
STEINBECK
INVESTMENT
COMPANY



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EQUITY PARTNERS



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Managing Director
THE STEPHENS GROUP



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Partner and Founding
Member
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Director
COMMONFUND
CAPITAL



Scott Johnson
Chief Executive Officer
SJ PARTNERS



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Managing Director
MERIT CAPITAL
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Ken Kanara
President and CEO
ECA



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Partner
BALANCE POINT
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Co-Founder & Managing
Partner
RELLEVANT PARTNERS



Peter Keehn
Global Head of Private
Equity
ALLSTATE
INVESTMENTS



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Managing Director
MOELIS ASSET
MANAGEMENT



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Partner
ICE MILLER



Sim Ketchum
Partner
TRIAGO



Charlie Kettering
Vice President
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Partner
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Cozen O'Connor's
Corporate Practice



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Founder, Managing
Partner
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John Koeppel
Partner
LIPPES MATHIAS



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Managing Partner
NCK CAPITAL



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Managing Partner
BLACK GRANITE
CAPITAL



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Partner
KENEX HOLDINGS



Timothy Laczkowski
Partner
Altacrest Capital



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Co-Founder
TRIPOINTE CAPITAL
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INC.



Gordon Liao
Founding Partner
MODJULE



Jeffrey Libshutz
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Managing Partner
GEORGIA OAK
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Founder and Chief
Executive Officer
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Managing Director
TAUBMAN CAPITAL



Patrick Machir
Partner
ATLANTIC-PACIFIC
CAPITAL, INC.



Brian V. Mankwitz
Managing Director
MANTUCKET CAPITAL
CORP.



David Mann
Managing Partner
THE FIREFLY GROUP



Upacala Mapatuna
Chief Investment Officer
VICTORY PARK CAPITAL



Steven Marcus
Managing Member
RAINBOW CAPITAL

Our Expert Speakers



Paul Marino
Partner
SADIS & GOLDBERG LLP



Joncarlo Mark
Founder & Managing
Member
UPWELLING CAPITAL
GROUP



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Partner
SAMSON CAPITAL
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PARTNERS LLC



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Senior Investment
Director
ABERDEEN STANDARD
INVESTMENTS



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Managing Director
STAR MOUNTAIN
CAPITAL



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Partner
BROADGATE CAPITAL



Phil McNeill
Managing Partner
FARRAGUT CAPITAL
PARTNERS



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Managing Partner
FIVE CROWNS CAPITAL



Kevin Meyers
Managing Partner
FIRST HAVEN CAPITAL



Christopher Migliaccio
Partner
PKF O'CONNOR DAVIES



Mike Miller
Partner
HOLLAND & KNIGHT



Jeff Mizrahi
Partner
MFG PARTNERS LLC



Ronald Moore
Partner
KLH CAPITAL



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WHEREWITHAL
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Partner
BURNS & LEVINSON



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MTN CAPITAL
PARTNERS



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Managing Director
ARROWPOINT
PARTNERS



Ryan Ochs
Managing Director
LAFAYETTE SQUARE



Gerald O'Dwyer
Managing Director
BLACKMORE
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Founder
ODUM CAPITAL



Samantha Ory
General Partner
OUROBOROS GROUP
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Managing Director
STNL ADVISORS



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Managing Director
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CEO
PANTON CAPITAL
HOLDINGS



Kyun Park
Founde
APERION
MANAGEMENT



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MERK CAPITAL
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Richard Petrocelli
Senior Advisor
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Founding Partner
SEVEN HILLS CAPITAL



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Co-Founder & Sr.
Managing Director
APC HOLDINGS, LLC



Carr Preston
Managing Director
AKOYA CAPITAL
PARTNERS



Bob Puopolo
Partner
EPIC PARTNERS



Azhar Quader
Investor
QUEENS COURT
CAPITAL MANAGEMENT



Jill Raker
Managing Partner
GREENBRIAR EQUITY



Steve Reinstadtler
Partner
SR CAPITAL ADVISORS

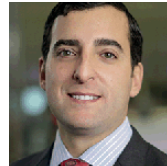
Our Expert Speakers



Rodney Reisdorf
CEO & Co-Founder
VERIVEND



Michael Revord
Managing Partner
ALDINE CAPITAL



Carl Riccadonna
Chief US Economist
BLOOMBERG



Tarrus Richardson
Founder & CEO
IMB PARTNERS



Mark A. Riser
Partner
MORNINGSIDE PRIVATE
INVESTORS



Greg Robinson
Founder, Managing
Director
RLG CAPITAL



Lenora Robinson
COO
IMB PARTNERS



Joe Rodgers
Managing Director
SOURCE CAPITAL



Douglas S. Rose
Managing Partner
GARDNER WEBSTER
CAPITAL PARTNERS



Nicholas Russell
Partner
TUCKERMAN CAPITAL



Dileep Saksena
Principal
4073 CAPITAL



Jonathan Saltzman
Managing Partner
TORQUE CAPITAL
GROUP



Melanie Santos Grant
Co-Founder & Managing
Director
2NDGENPARTNERS LLC



Sachin Sarnobat
Managing Director
ATALAYA CAPITAL
MANAGEMENT



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Managing Partner
FIVE CROWN CAPITAL,
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Ben Schneider
Managing Partner
BASE EQUITY
PARTNERS



Gabriel Schrade
Managing Director
LP FIRST CAPITAL



Jeffrey Schwartz
Managing Partner
CORBEL CAPITAL
PARTNERS



Charles Scripps
Managing Partner
BLACK LAKE CAPITAL



Christopher
Sheeren
Partner
HURON CAPITAL



Michael Shein
Managing Partner
CHARTWELL
INVESTMENTS



Peter Shelton
Partner
CORPORATE &
SECURITIES PRACTICE
GROUP, BENESCH LAW



Stephen Shelton
Managing Director of
Originations
GREAT ROCK CAPITAL



Bob Shettle
Managing Director
STAR MOUNTAIN
CAPITAL



Paul Shufro
Vice President
GREYROCK CAPITAL
GROUP



Adit Shukla
Managing Director
AMALGAM CAPITAL



Omar Simmons
EXALTARE CAPITAL
MANAGEMENT



Raji Singh
President
BROADGATE CAPITAL



Jonathan Slonim
Managing Partner
ILION CAPITAL
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R. Adam Smith
Founder and CEO
CIRCLE PEAK CAPITAL
LLC



Pavel Smyshlyayev
PrincipalBEACONHOUSE
CAPITAL
MANAGEMENT, LLC



Douglas Song
Managing Partner
PRODOS CAPITAL
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Gary Stark
Managing Partner
IRON RANGE
CAPITAL PARTNERS,
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Ira Starr
Partner
LONG POINT CAPITAL



Chad Strader
Partner
RED ARTS CAPITAL



Jennifer Stewart
Managing Partner
JSTAR HOLDINGS

Our Expert Speakers



Chase Stuart
Managing Partner
ICE MILLER



Andrew Suh
Partner
PKF O'CONNOR DAVIES



Josh Susser
Founding Partner
CASCADILY



Eric Taylor
Founder, CEO & CIO
TRIDENT



Mark Tedford
Managing Director
VALLEY RIDGE
INVESTMENT
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Michael A. Teplitsky
Managing Director
WYNNCHURCH
CAPITAL



Saquib Toor
Managing Partner
BEACONHOUSE
CAPITAL
MANAGEMENT, LLC



Olivier Trouveroy
Managing Partner
MTN CAPITAL
PARTNERS



Mark D. Ullman
General Partner
CHARTER OAK EQUITY



Lee Vandermyde
Founding Partner
STONE POINTE



Steve Vivian
Principal & Founder
KESTREL CAPITAL
GROUP LLC



Preston G. Walsh
Partner
PNC MEZZANINE
CAPITAL



Reeve Waud
Founder & Managing
Partner
WAUD CAPITAL



Tim Welles
Managing Partner
PINE STREET



Corey Whisner
Partner
ROTUNDA CAPITAL
PARTNERS



Seth Eliot Wilson
Founder & Managing
Partner
HEADHAUL CAPITAL
PARTNERS LLC



Bryce Winkle
Managing Director
RESURGENT CAPITAL
PARTNERS



Ana Winters
Managing Director
MIDWEST MEZZANINE
FUNDS



Zach Wooldridge
Co-Founder
ELM CREEK PARTNERS



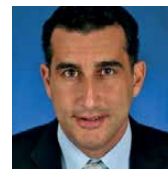
Brian Yoon
Managing Director
CORBEL CAPITAL
PARTNERS



Monty Yort
Managing Partner
GENNX360 CAPITAL
PARTNERS



Christopher Yost
Principal
APERION
MANAGEMENT



Jacques Youssefmir
Partner
OCEAN AVENUE
CAPITAL PARTNERS, L.P.



Johannes Zwick
Managing Partner
ZWICK PARTNERS

Independent Sponsor Awards

To celebrate the rapidly evolving Independent Sponsor space, the Inaugural Independent Sponsor Awards will be held once again in Miami, Florida in February 2024.

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 2023 Winners!

Lifetime Achievement Award

Richard Baum

Managing Partner, Consumer Growth Partners

Capital Provider of the Year

Preston Walsh

Partner, PNC Mezzanine

Diversity ESG Award of the Year

Tarrus Richardson

Founder and CEO, IMB Partners

Deal of the year

Grant Kornman

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