LEADERS OF INFLUENCE:

Private Equity, Investors & Advisors

WITH THE UNIQUE AND UNCHARTED SCENARIOS THAT WE ALL FACED OVER THE LAST COUPLE OF YEARS, GROWING businesses in the market for private equity have had to face a whole new landscape. The economic climate 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.

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' leading experts on the subject, along with information about their careers and specialties.

Congratulations to each of the outstanding professionals who made this list.

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 and chosen based on a demonstration of impact made on the profession and on the Los Angeles community.

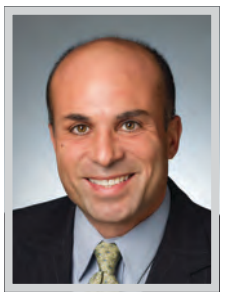
LOI: PRIVATE EQUITY, INVESTORS & ADVISORS

ARIE BELLDEGRUN

Co-Founder and Senior Managing Director
Vida Ventures, LLC

Arie Belldegrun, MD is co-founder and senior managing director of Vida Ventures. He previously founded Kite Pharma, where he served as chairman, president, and chief executive officer of Kite until its acquisition in October 2017 by Gilead Sciences for $11.9 billion, the industry's largest ever pre-commercial acquisition.

As a surgeon, entrepreneur and visionary, Dr. Belldegrun founded Vida to build upon Kite's cancer-fighting success, create more opportunities like CAR T, and convert cutting-edge science into groundbreaking therapies for patients. Vida, a next-generation life sciences venture firm based in Los Angeles, now has approximately $2 billion in assets under management. Under Dr. Belldegrun's leadership, Vida has established its approach to life sciences investing by bringing together a network of industry experts alongside a powerful investor base undaunted by inherent challenges in drug development, with the goal of fundamentally changing the course of human disease.



DAVID BONROUHI

Managing Director
Calabasas Capital

David Bonrouhi has been in investment banking and private equity for 25 years and he brings bulge bracket wall street experience to the lower middle market. He and his team have significant experience working with family businesses seeking ownership liquidity through private equity and M&A transactions. Bonrouhi has the unique ability of executing complex transactions for small and mid-sized companies and negotiating on their behalf with highly sophisticated private equity firms and large public companies.

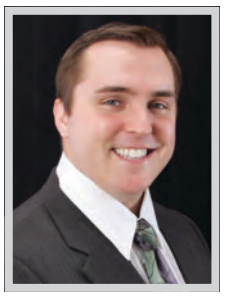
Bonrouhi and his team have completed deals in a variety of industries including food & restaurants, aerospace & defense, software, business services, consumer products and industrial manufacturing, including the sale of Berkley Molded Fiber to International Paper, the sale of Invotech to HID Global, and the sales of several companies to affiliates of private equity firms including Advanced Photon Technology, Bob's Big Boy Salad Dressings, Impact Landscape Corp. and SK Property Management.

CLAY BRYAN

Managing Director, Sponsor Coverage
FocalPoint Partners, LLC

Clay Bryan is a managing director and leads the Financial Sponsor Group at FocalPoint, a B. Riley Financial Company. FocalPoint is a middle market investment bank headquartered in Los Angeles, with branch offices in Chicago, Dallas, New York, and Shanghai. The firm has a long history of delivering founder-owned businesses to the private equity market with EBITDA consistently ranging from $10-75 million.

Bryan has approximately 22 years of investment banking experience in private equity coverage, debt and equity capital markets, M&A, 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. FocalPoint has significantly expanded its private equity transaction advisory practice, both in terms of M&A and capital markets transactions. The firm closed more than 39 deals in 2021 with an aggregate transaction value of $5.6 billion and is more than 60 professionals strong today.



CHRIS CHELEKIS

Vice President
William and Henry Associates

Chris Chelekis led the William & Henry team representing Enrollment123 Inc., a leading provider of software to the healthcare insurance industry, in the sale to Housatonic Partners, a growth-oriented private equity firm. Chelekis also led the William and Henry team in representing Affordable Water Heaters & Plumbing, a leading in-home provider of water heater replacement, repair and installation services, including ancillary plumbing services, in the sale to Dubin Clark.

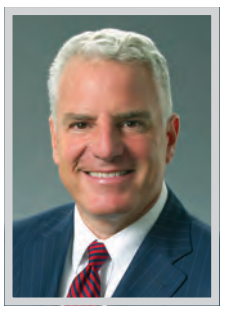
Previous deals include representation in the sale of AMTEX, a leading independent national provider of Hospitality Supplies, to HCI Equity Partners, a lower middle market private equity firm focused on partnering with family and founder owned manufacturing, service and distribution companies. Chelekis also has a continuous and active involvement in mentoring and coaching young business professionals in the M&A advisory service and finance industry. Chelekis also acts as an adjunct professor of business analytics at the University of Massachusetts.

LEON CHEN

Managing Partner, Co-Head of Growth Equity
Kayne Partners

Leon Chen joined Kayne Partners as a senior associate and in less than ten years, he has risen to become a managing partner and co-head of Kayne's growth and 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 is particularly good at building relationships with entrepreneurs and helping them understand the value of partnering with Kayne.

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 and he values working with these entrepreneurs to expand their market footprint and develop break-through technologies.

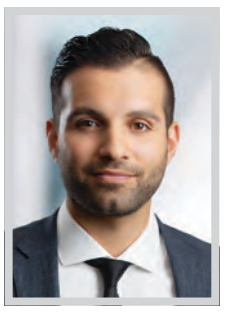


DAN CLIVNER

Managing Partner
Sidley Austin LLP

Dan Clivner, a global leader at Sidley Austin, is managing partner of the firm's 140-lawyer Los Angeles offices, among the top 10 in L.A., and guides the direction of the firm internationally as a member of its Executive Committee and co-leader of its 398-lawyer global M&A and Private Equity group.

Clivner holds the distinction of opening Sidley's offices in Century City (and previously for Simpson Thacher). In the past five years, he has elevated the firm's global M&A / PE practice from 40th place to third place nationally by deal value. In addition to maintaining one of the most prolific and influential M&A and PE practices in the country, Clivner continues to handle some of the firm's highest-profile transactional matters. His extensive experience includes matters in PE, M&A and corporate governance, and advising executives, boards, management, special committees, and investment banking firms on domestic and international corporate transactions.



ANTHONY CONSOLI

Managing Partner
Massumi + Consoli LLP

Anthony Consoli is a managing partner of Massumi + Consoli LLP in Los Angeles, where he represents private funds and other financial institutions, along with their portfolio companies, in structuring and negotiating complex private equity and M&A transactions in the middle market.

Consoli co-founded Massumi + Consoli LLP over seven years ago after spinning out of Kirkland & Ellis LLP, and he has since overseen the MCLLP's aggressive growth as the firm has evolved into one of the largest private equity M&A practices on the West Coast. The firm counts among its impressive client roster some of the most discerning investors in the country as it fulfills its mission of exceeding the client service of the most recognized international law firms at an unmatched value proposition. Consoli is also a lecturer in law at UCLA School of Law where he has taught M&A Due Diligence for several years.

NISHITA CUMMINGS

Managing Partner, Co-Head of Growth Equity
Kayne Partners

Nishita Cummings is the managing partner, co-head, and co-portfolio manager of the growth private equity funds (Kayne Partners) at Kayne Anderson Capital Advisors (Kayne), a leading alternative investment management firm focused on real estate, credit, infrastructure/energy, renewables, and growth equity. She has held a leading role in building a diverse team comprising over 50% female or diverse team members.

Since joining Kayne in 2007, Cummings has been a key player in many of the 47 platform investments and 25 exits completed by the Kayne Partners team across five funds and six co-investment vehicles. Most recently, she led Kayne Partners' more than $60 million growth equity investment in Panzura in 2022. At the end of 2021, Cummings led Kayne Partners' $50 million growth equity investment in KlearNow, one of many of Cummings' investments featuring innovative technology solutions addressing enormous end markets.

MASSUMI + CONSOLI
LLP

PRIVATE EQUITY AND M&A COUNSEL.

MC LLP

www.mcllp.com

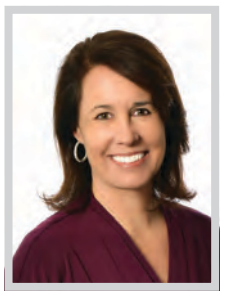
LOI: PRIVATE EQUITY, INVESTORS & ADVISORS

JAMES DAVIDSON

President & Managing Director
Avant Advisory Group

Jim Davidson founded Avant Advisory Group over 25 years ago after serving stints with PricewaterhouseCoopers and in various C-Suite positions, including president & CEO, CFO, Chief Accounting Officer, Controller, etc. and serving on multiple boards of directors.

Davidson has advised hundreds of private equity firms across multiple industries from Los Angeles to across the country. He has provided M&A transaction support and has performed hundreds of buy-side and sell-side diligence engagements that include financial / quality of earnings and operations for companies ranging from distressed to multi-billion-dollar firms. He has served as chief restructuring officer and financial advisor to numerous distressed companies in doing both operational turnarounds and financial restructurings. Furthermore, he and his firm have been engaged by both counsel and buyers/investors to investigate and opine on numerous forensic and fraud examinations, including post-acquisition, conflicts of interest and breach of fiduciary duty issues and disputes.

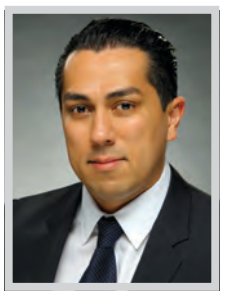


EVA DAVIS

Chair, Transactions Department
Winston & Strawn LLP

Eva Davis focuses her practice on US and cross-border complex business transactions with a particular focus on mergers and acquisitions and private equity. Her expertise lies in market trends and deal terms in the middle market – while taking a commercial approach to transactions and navigating clients through changing landscapes. She advises both strategics and private equity funds and their portfolio companies. Typical transaction sizes in her purview range from $50 million to over $1.0 billion.

As chair of Winston & Strawn's Private Equity Practice group from 2017 through 2021, Davis significantly grew the firm's PE practice. For example, since January 2021, Winston's PE practice closed 285 deals valued at over $38 billion in total. During that same 18-month period, she personally led and closed approximately 20 deals, totaling a deal value of over $2 billion for eight California-based PE funds.

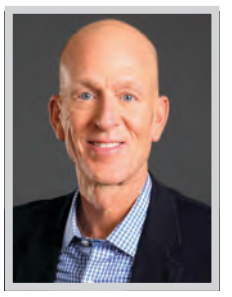


BEHDAD EGHBALI

Co-Founder and Managing Partner
Clearlake Capital Group, L.P.

As co-founder and managing partner of Clearlake Capital Group, Behdad Eghbali was instrumental in the growth and success of Clearlake since its founding in 2006. Today Clearlake is one of the largest LA based private equity firms with over $72 billion of assets under management, with over 40 operating companies and 70,000 employees.

Eghbali currently serves on the board of directors of several Clearlake portfolio companies including Appriss, the Better for You companies, Brightly Software, Confluence, Constant Contact, Cornerstone OnDemand, DigiCert, Diligent, EagleView, InvestCloud, Ivanti Software, Newfold Digital, nThrive, Perforce, Quest and Symplr where he leads Clearlake's operational improvement approach O.P.S. by working directly with management and Clearlake's team members to enhance financial and operating performance. As part of this approach, Eghbali is committed to the tenets of responsible investing and seeks to contribute to, and foster, a long-term value creation approach to ESG as well as financial factors.

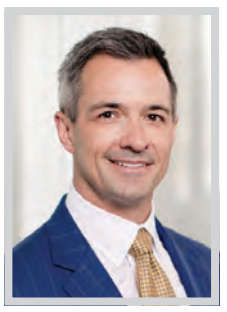


RUSSELL EVANS

Managing Principal
Avitas Capital Partners, LLC

Russell Evans has been a financial advisor since 1992. Over the last five years, he has led Avitas Wealth Management, an RIA firm he Co-Founded in Century City, Los Angeles. During that time, he also co-founded and launched a subsidiary, Avitas Capital Partners, LLC to operate as an alternative private equity arm for the firm. As a portfolio manager with greater than one billion dollars in assets under advisement, it's important for Evans to continue to find ways to add value for his clients. He is an enthusiastic proponent of in-house asset management and accountability. A student of behavioral finance, Evans is astute at helping clients navigate volatile markets and keeping them on track.

As the firm's managing principal, Evans serves as co-founder and portfolio manager for the Avitas Wealth Management Equity Group, as well as Avitas Capital Partners Ascent Fund, in addition to handling day-to-day key business operations.

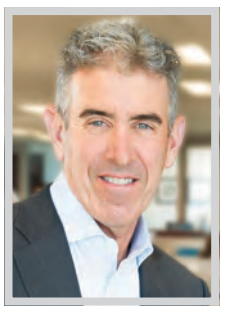


ROBERT FOX

Corporate Business Development Executive
O'Melveny & Myers LLP

Robert Fox, corporate business development executive, has served as the face of O'Melveny's M&A and Corporate practice groups for four years. He supports the firm's existing private equity and corporate clients' investment needs. He does this by generating deal flow and sourcing capital through a network of corporate clients and M&A contacts.

Fox's ability to generate business opportunities also drives significant business growth for the firm. With the firm's robust legal platform supported by 800 attorneys, Fox brings valuable legal solutions to O'Melveny's clients. He is of a new breed of private equity professionals who leverage finance experience and background in the legal context to drive firm growth. He is also one of the few private equity professionals who have ventured into the legal industry to be the front face of corporate development for a large corporate law firm.

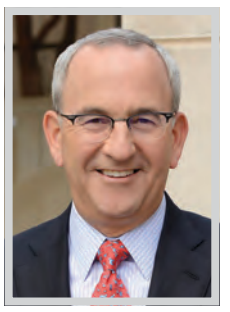


JEFF FRIEDMAN

CEO & Co-Founder
Mesa West Capital

Founded in 2004 by co-founders Jeff Friedman and Mark Zytko, Mesa West Capital is a commercial real estate portfolio lender and a pioneer in the debt fund space with strong history within the industry.

Friedman's business insight and remarkable leadership have allowed Mesa West to navigate through and past the COVID-19 crisis, as the firm continued to grow its portfolio through unprecedented times. While others sat on the sidelines, Mesa West stayed active, originated loans even during the height the pandemic. The firm's continued success and ongoing excellence is a tribute to Friedman's business acumen and his desire to have Mesa West continue to increase its impact on the industry while being a good steward within the community. Under his stewardship, earlier this year, the firm launched its new special situations lending platform. The new lending platform is the next evolution for the firm's lending capabilities.

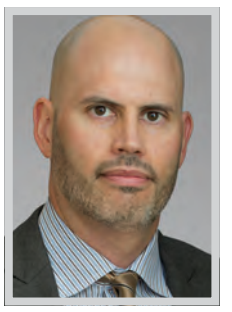


LLOYD GREIF

President & CEO
Greif & Co.

Lloyd Greif is a veteran investment banker. 2022 marks his 40th anniversary in the field and the 30th anniversary of the investment bank he founded and leads, Greif & Co. He spent his apprenticeship at Sutro & Co. during the 1980s, rising from associate to vice chairman, head of the Investment Banking Division and a member of the five-person Management Committee that ran the 130-year-old company.

Greif engineered his own spin out from Sutro with two colleagues in early 1992 to pursue his entrepreneurial endeavor, Greif & Co, a middle-market investment bank that engineers merger & acquisition transactions between $50 million and $2 billion in enterprise value, as well as equity and debt financings in excess of $10 million, exclusively for entrepreneurially owned and operated growth companies. Greif is a zealot for his clients, always putting their interests first, avoiding conflicts of interest, and pressing for the entrepreneurs he represents.



LUKE GUERRA

Partner
Kirkland & Ellis LLP

Luke Guerra is a corporate partner focusing in the areas of private equity, mergers and acquisitions, corporate securities, finance and corporate governance. He represents buyers, sellers, and private equity funds in a variety of corporate transactions, including leveraged buyouts, public and private mergers and acquisitions, equity investments, restructurings and recapitalizations. Select private equity clients include Clearlake Capital, Capital, Industrial Growth Partners, Lovell Minnick Partners, TPGGrowth, Shamrock Capital Advisors, Vector Capital, and numerous portfolio companies held by these clients.

Guerra has completed a range of complex transactions across industries such as technology, manufacturing, retail, financial services, energy, health care and media & entertainment. Chambers USA has recognized Guerra with sources commenting, "he is very responsive, available all the time, knows the market well and can handle a variety of different matters" and is "someone that you can rely on for answers."

Vida Ventures

Proudly congratulates Senior Managing Directors **Arie Belldegrun, MD** and **Helen S. Kim** on being selected as 2022 Leaders of Influence by the Los Angeles Business Journal.

Their leadership and vision has been invaluable to helping transform LA into a leading biotech hub that fosters innovation and scientific breakthroughs.

VIDA ventures

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2029 Century Park East,
Suite 1370
Los Angeles, CA 90067

Boston
40 Broad Street,
Suite 201
Boston, MA 02109

VidaVentures.com

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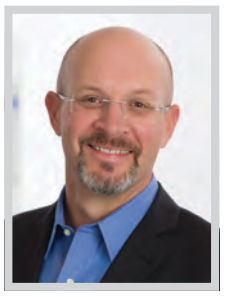
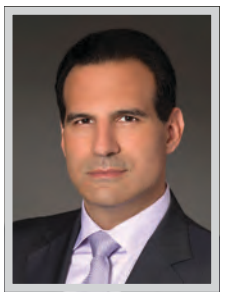


JEREMY HOLLAND

Managing Partner, Origination
The Riverside Company

Jeremy Holland is a managing partner at The Riverside Company, leading the Origination team across the various funds/strategies in North America. Holland joined Riverside in 2010, when the firm recruited him to switch from executing deals to focusing on originating new investment opportunities in the Western U.S. and Canada. He has nearly 25 years of private equity experience, closing deals across a range of industries and throughout the capital structure.

Holland's influence in the private equity community is heavily derived from his enthusiastic support of other M&A professionals' career paths. He has spent a tremendous amount of time over the years thoughtfully referring deals to people who would not have otherwise seen them, helping people work their way through career advancement and/or pivoting their career in a new direction. Holland also spends a great deal of time mentoring those newer to the profession.



MEHDI KHODADAD

Partner; Co-Leader, Global Private Equity Practice; Member, Executive Committee
Sidley Austin LLP

Few peers can match Mehdi Khodadad in the variety, creative structuring, complexity, and output of the deals he orchestrates. Co-leader of Sidley's global Private Equity practice, Khodadad has led more than 85 private equity/M&A deals alone since the start of 2021, with an aggregate value exceeding $70.3 billion.

In one of 2021's most widely reported deals, Khodadad advised long-time private equity client Clearlake Capital Group, L.P. in its $5.4 billion acquisition of Quest Software from Francisco Partners. This complex LBO was a multi-jurisdictional deal, under an extremely short fuse as PE firms aggressively compete for leading technology/software platforms. Quest was originally acquired by Francisco Partners as a carve-out from Dell, and the Clearlake transaction involved restructuring Quest as two separate business units under an Irish-domiciled Cayman structure, achieved in less than two weeks. A trusted advisor, Khodadad undertook other key platform acquisitions during 2021 for Clearlake and other sponsors.'

HELEN S. KIM

Senior Managing Director and Chief Investment Officer
Vida Ventures, LLC

Helen S. Kim has over three decades of leadership experience and an inimitable track record of outstanding accomplishments, becoming one of the most accomplished women business leaders in biotechnology. She is currently a senior managing director of Vida Ventures, a venture capital firm in Los Angeles with a mission to expand life sciences by advancing transformative biomedical innovations. Kim joined Vida in 2019 and played a central role in raising $825 million for the firm's latest fund, which now has approximately $2 billion in assets under management.

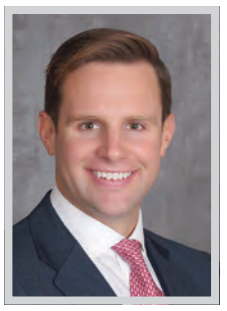
Kim also serves on the Management Committee and leads the LA office. At Vida, Kim is laser-focused on aligning with incubators to nurture early science in areas of unmet need and bringing scientific innovation to LA and beyond. The opportunities she has identified continue to build the incentives for investors to recognize the great technologies coming out of LA.

JASON S. KIM

Partner, Corporate Law
Blank Rome LLP

Jason S. Kim is a 30-year deal lawyer. His practice focuses on representing domestic and foreign companies, financial institutions, funds, serial entrepreneurs, and high net worth individuals in corporate and real estate transactions and related financing with special emphasis on cross-border deals within the 50 states and internationally. Kim's deals in the 50 states involve foreign buyers, PEs, and banks. Frequently, he is brought into PE transactions as corporate counsel, on the other side of the PEs.

Among Kim's largest and most significant deals has been investee-side representation of a green energy company in raising over $150 million through four rounds of equity financing. Greatly influenced by the 1992 Los Angeles riots, which took place as he was graduating from UCLA School of Law, Kim has dedicated all of his significant pro bono hours to assisting the greater Los Angeles community in issues of civil rights and race relations.

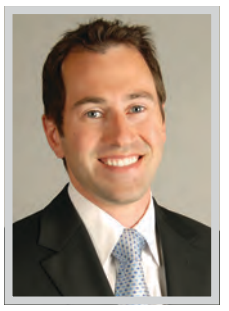


DAN KRAFT

Managing Director, Financial Sponsors Coverage
B. Riley Financial, Inc.

Dan Kraft currently serves as a managing director in Financial Sponsors Coverage at B. Riley Financial, Inc. In this role, Kraft is responsible for development of the firm's new and existing relationships among leading middle market sponsors, direct lenders and alternative asset managers, both locally and nationally.

Working closely with sponsor clients, Kraft is adept at delivering private equity firms and portfolio companies with tailored solutions to enhance value throughout the full investment lifecycle – from pre-deal due diligence, post-acquisition closing and the entire hold period of portfolio company investment, including the eventual monetization. Through partnership, coordination and increased awareness, Kraft and the financial sponsors group represent the full breadth of B. Riley's diversified platform which offers investment banking, valuation, financial and operational turnaround management, and additional advisory services tailored to the unique needs of its private equity clients.



ARI LANIN

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 guidance on public and private merger transactions, stock and asset sales, joint ventures, and strategic partnerships. Lanin regularly advises some of the best-known private equity firms in LA on their complex transactions.

Lanin has handled long-term investments and acquisitions for Katzenberg's WndrCo since its 2017 formation and advised The Chernin Group since its formation. Recent representations also include his work for Platinum Equity in its $5.25 billion acquisition of Solenis, a leading global producer of specialty chemicals used in water-intensive industries, from Clayton, Dubilier & Rice and BASF and in the sale of Orbit Irrigation to Husqvarna Group. He has also advised Platinum Equity in the acquisition of Fifth Sun from its company founder.

JONATHAN LITTRELL

Managing Partner
Raines Feldman

Jonathan D. Littrell is the managing partner of Raines Feldman LLP. He has significant transactional experience in a broad range of corporate, private equity, venture capital and securities disciplines. His practice includes the representation of public and private entities, fund sponsors, family offices and asset management firms in all aspects of corporate governance and finance.

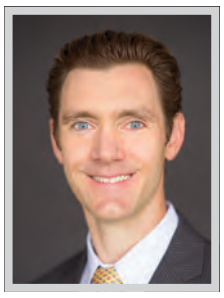
Littrell's recent accomplishments in the M&A space include the representation of a consumer products company in a complex structured stock-for-stock option purchase with a publicly traded Canadian entity with a $2.7 billion market cap, representing a Colorado medical company in a $300 million reverse merger with a $700 million acquiring entity and concurrent funding resulting in a $1 billion enterprise valuation, and serving as lead counsel for a roll-up and go public transaction involving two private equity funds that generated a market cap of $1.65 billion for the client.

NEIL MALIK

Founder & CEO
K1 Investment Management

Neil Malik has overseen more than 190 investments in enterprise software since founding K1 Investment Management and has grown AUM to over $13 billion. He is known by his colleagues and collaborators to be incredibly dedicated to his craft, developing the team, and building category-leading software businesses.

Malik is also actively involved in Sponsors for Educational Opportunity, offering students in its scholar program internship and development opportunities. He is passionate about making careers in finance and tech more accessible to diverse candidates and first-generation college students. K1 is a sponsor and supporter of Girls Who Code, Junior Achievement, TOIGO, and other organizations focused on closing the diversity gap in fields like finance and tech. Malik is also passionate about the environment and sustainability. K1's office building is Gold-LEED Certified and the company actively addresses climate change and meeting ESG goals, enhancing resilience, and supporting more equitable communities.

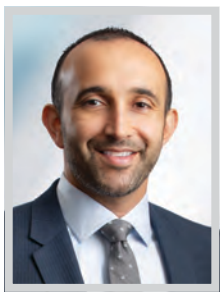


JEREMIAH MANN

Managing Director, Industrials
Intrepid Investment Bankers

Jeremiah Mann is one of the Founders of Intrepid, and a managing director at the firm, focused on deal execution in the Industrials and Business Services verticals. Mann began his career over 21 years ago as an analyst at Barrington Associates, the predecessor firm to Intrepid. Across the development of Barrington and Intrepid, Mann has led recruiting and training efforts to ensure top-level junior bankers were brought into the firms and developed to become excellent investment bankers.

On the deal execution front, Mann has shown unwavering commitment to his clients across process types, from broad auctions to negotiated preemptive deals, and shareholder situations. While Mann excels at bespoke transaction strategy development and implementation, he also demonstrates strong client advocacy and education throughout the process. Over the last 24+ months, despite the pandemic, Mann closed the most deals in his career in the time period.



PETER MASSUMI

Managing Partner, Co-Founder
Massumi and Consoli LLP

Peter Massumi identified his target practice area early and accordingly chose to start his career at Kirkland & Ellis LLP's Los Angeles office. Identifying a clear need in the market to present an enhanced solution to private equity sponsors for middle market M&A counsel, he and his co-founder spun out of Kirkland & Ellis in 2015 to start what has become a leading law firm specializing in private equity / M&A.

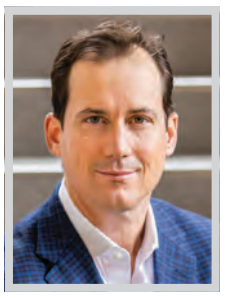
The firm's mission has been to deliver private equity / M&A counsel within a framework radically different than, and with service superior to, the entrenched big firm model. It is now one of the largest dedicated private equity / M&A practices on the West Coast. To date, MCLLP has established a roster of some of the most discerning and respected private equity firms, along with a high performing team of attorneys with a passion for deal work.

SCOTT MINERD

Founding Managing Partner; Global Chief Investment Officer; Chairman and Member, Executive Committee
Guggenheim Partners

Scott Minerd is a founding and managing partner at Guggenheim Partners. In his role as global chief investment officer, he guides the firm's investment strategies and oversees client accounts across a broad range of fixed-income and equity securities. Previously, Minerd was a managing director with Credit Suisse First Boston in charge of trading and risk management for the Fixed Income Credit Trading Group. In this position, he was responsible for the corporate bond, preferred stock, money markets, U.S. government agency and sovereign debt, derivatives securities, structured debt and interest rate swaps trading business units.

Minerd is a member of the Federal Reserve Bank of New York's Investor Advisory Committee on Financial Markets, helping advise the NY Fed President and senior management at the bank about the current financial markets and ways the public and private sectors can better understand and mitigate systematic risks.



JOEL MONTMINY

President & CEO
Montminy & Co LLC

Founding Montminy & Co LLC in 2010, Joel Montminy has grown his eponymous firm every year since inception, representing over 220 clients in a wide variety of corporate finance assignments. Today, Montminy & Co. has 25 team members, including 17 registered representatives, ranking as one of the largest privately held boutique investment banks in LA.

Montminy leads the firm and spearheads client assignments across the globe, including cross-border and domestic mergers and acquisitions, leveraged and management buyouts, and private placements of equity securities, restructurings, business valuations, fairness opinions and strategic advisory assignments. In his career, Montminy has personally originated, led and closed over $6 billion of middle market transaction volume, including over $2.2 billion in cross-border transactions. In the last 12 months, Montminy has personally led and closed $200 million of middle market transactions for L.A.-based companies across technology, media, health & wellness and professional sports.

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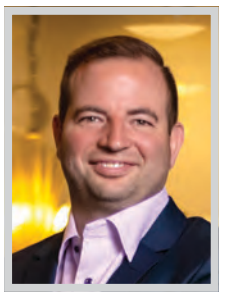
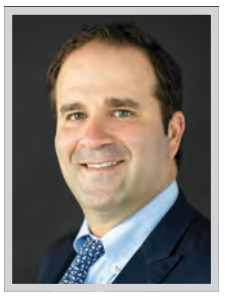


ERIC MOSS

Director
Greystone Financial Group, LLC

Eric Moss is a director at Greystone Financial Group and leads the Los Angeles office for the firm. After graduating from Michigan State University, he worked at JPMorgan in Century City where he utilized his relationship building and problem solving to help run Chase Wealth Management for the West region. After managing more than $500 million of assets at TDAmeritrade, Moss joined Greystone Financial Group where he specializes in helping high net worth clients through transitional phases of their lives including retirement, divorce, widowhood and the sale of businesses. He focuses on financial planning and asset management to help clients reach their goals.

Moss believes in open, consistent communication and meeting with clients on a regular basis to discuss their financial plans. Learning his clients' individual goals and building a financial road map to reach them is paramount to Moss' and Greystone's business.



STEVE NELSON

Managing Director,
Head of Financial Sponsor Coverage
Intrepid Investment Bankers

Steve Nelson is a managing director and head of the Financial Sponsors Group at Intrepid Investment Bankers. Since launching the Financial Sponsors coverage practice, Nelson has established deep relationships across the middle-market financial sponsor landscape which has led to these clients retaining Intrepid for sell-side, buy-side, and capital markets mandates.

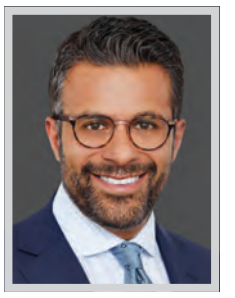
Before joining Intrepid, Nelson spent the first 15+ years of his career executing M&A transactions on behalf of both entrepreneurs and private equity firms across the consumer, industrial, healthcare, and business services sectors. During his tenure at Wells Fargo, he helped lead the firm's Industrial sell-side M&A franchise and in 2020 alone, he originated and executed over $2 billion in Enterprise Value for clients, including the $1.7 billion sale of Open Systems International, Inc. to Emerson and the sale of Pacur, Inc. to Gryphon Investors. Other notable transactions include the sales of Equipment Depot to Mitsubishi Logisnext.

CYRUS NIKOU

Founder & Managing Partner
Atar Capital, LLC

Cyrus Nikou is the founder and managing partner of Atar Capital, a private investment firm based in Century City, where he oversees the firm's strategy including M&A, operations, and business development. Atar was founded in 2016 and focuses on buyouts of companies within the lower middle market. In five years, Atar has completed 17 transactions and is currently managing a portfolio of 13 companies with an aggregate revenue of over $1.5 billion per year, with over 13,000 employees, and operations throughout North America, Europe and Asia.

In 2021, Atar's portfolio companies successfully navigated through another year with unique challenges. Nikou attributes this success to consistently visiting each company for onsite strategy sessions. In addition, Atar had its best year yet on the M&A front, acquiring six companies across four industries and completing its first exit in December when it sold RWS Facility Services and Sustainable Solutions Group.

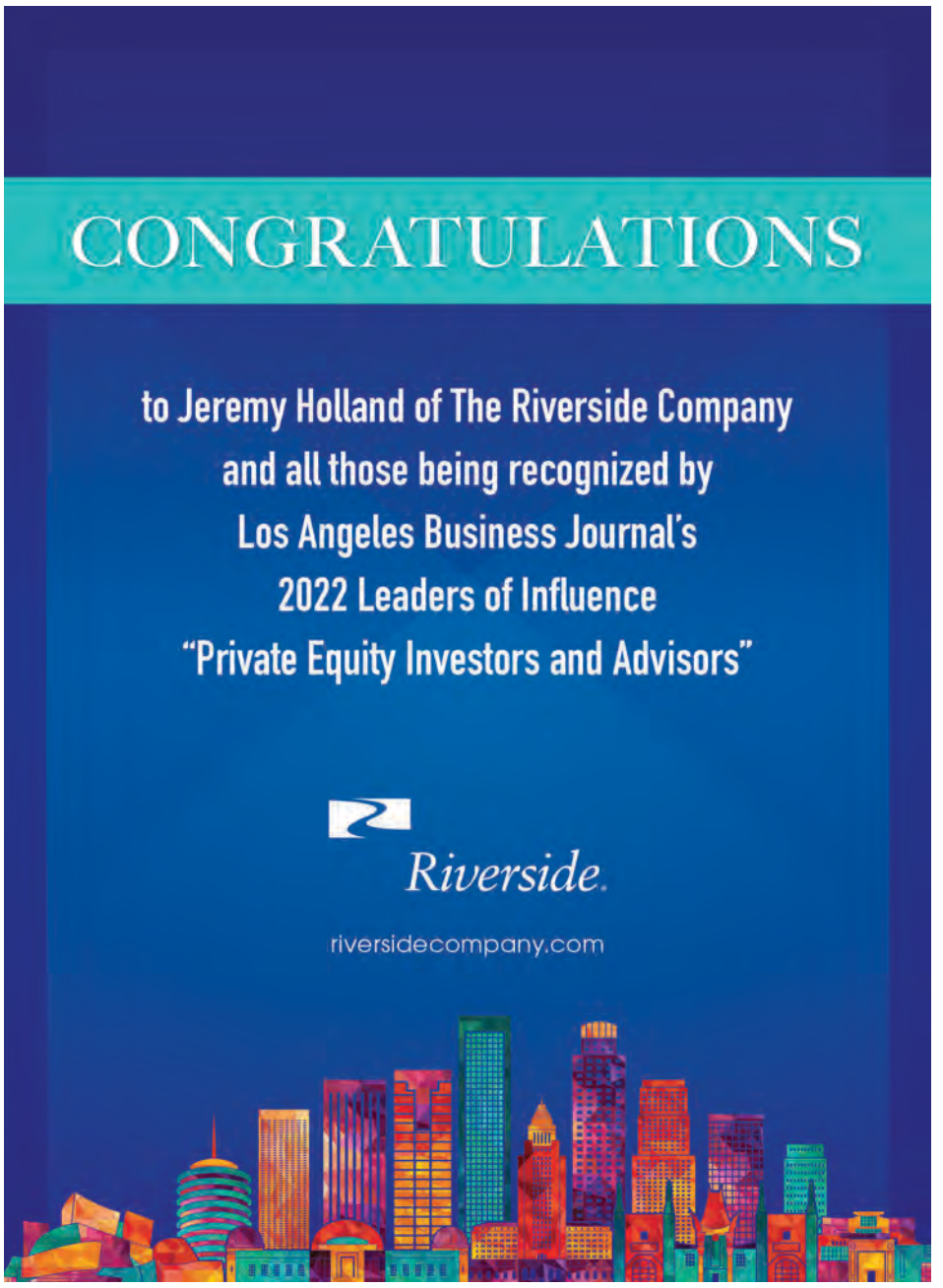


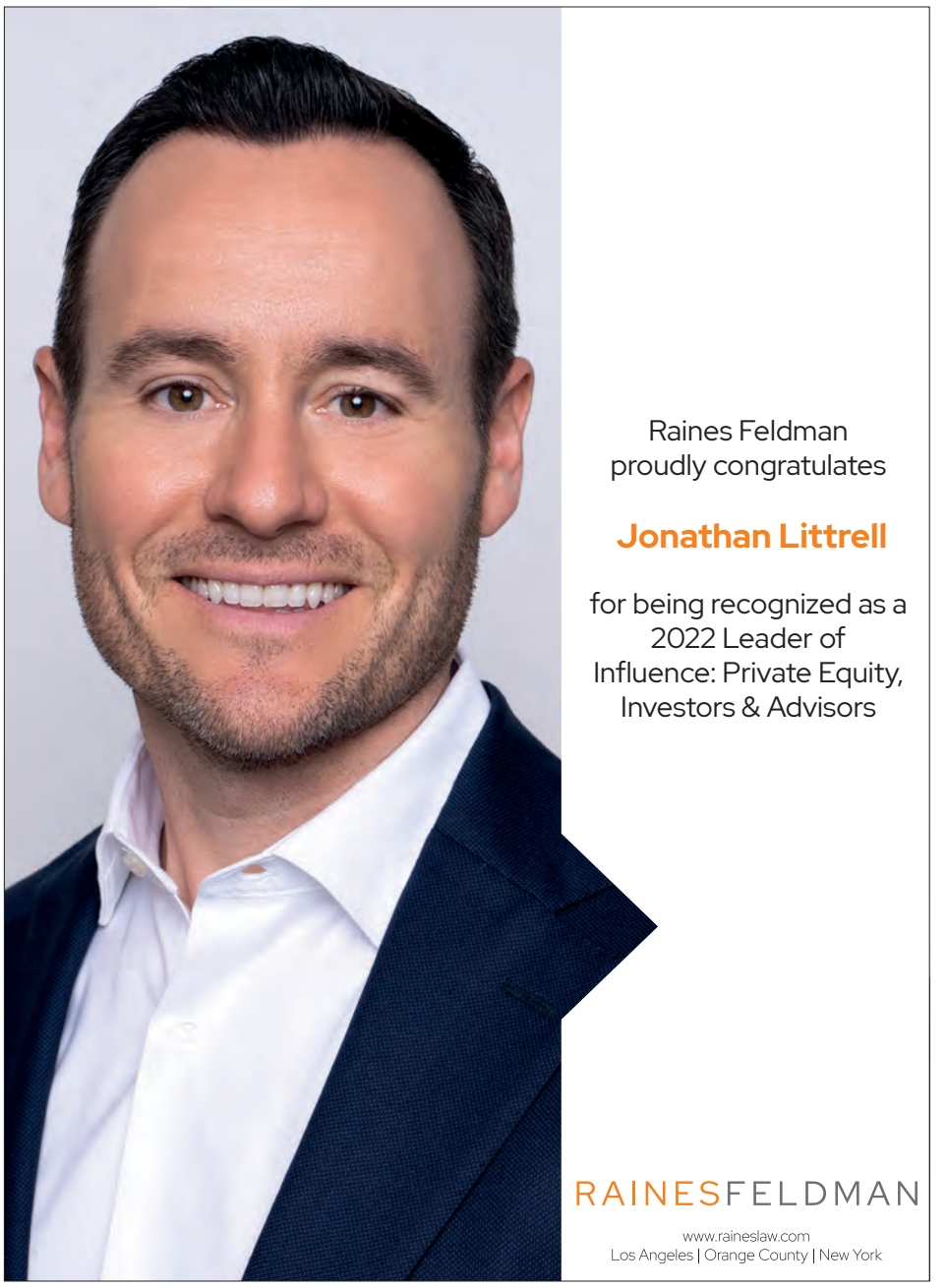
NISHEN RADIA

Co-Founder & Managing Partner
FocalPoint Partners, LLC

Nishen Radia is co-founder and managing partner of FocalPoint Partners, a middle market investment bank headquartered in Los Angeles, with branch offices in Chicago, Dallas, New York, and Shanghai. Since its inception in 2002, FocalPoint has delivered a diversified suite of financial services to clients, including mergers and acquisitions, debt placements, and financial restructurings. The firm closed more than 39 deals in 2021 with an aggregate transaction value of $5.6 billion.

In 2019, Radia launched FocalPoint's Financial Sponsors Group and significantly expanded the firm's private equity transaction advisory practice, both in terms of M&A and capital markets transactions. Radia has approximately 26 years of investment banking experience advising owners and stakeholders of middle market companies (typically those with revenues of $75 to $500 million) on mergers and acquisitions, debt and equity recapitalizations, and financial restructurings. He has served as principal financial advisor on numerous high stakes transactions.





EDWARD RING

Founder & CEO
New Standard Equities

Edward Ring founded New Standard Equities in 2010, naming it for a new standard of integrity that he felt was missing coming out of the Great Recession and the fraudulent Bernie Madoff era. He wanted to bring a level of transparency investors were seeking. The firm has grown under Ring's leadership into a leading investor of multifamily properties. The company has generated $180 million in profit over the past 12 years with an average project-level return of more than 29% per year.

Recent examples of the visionary approach that Ring brings to projects resulting in exceptionally high internal rate of return for Los Angeles and Southern California investors include two projects in Washington State. The sale of these two assets, which were acquired within 11 months of each other in 2016, resulted in a 44.7% IRR and 57.7% IRR, respectively, and approximately $70 million in total profit.

RUSS ROENICK

Managing Partner
Transom Capital Group

Russ Roenick is a co-founder and managing partner at Transom Capital Group. He is a member of the Investment Committee at the Transom firm and sits on the board of each of Transom Capital Group's portfolio companies. As a partner at Transom Capital Group, Roenick has helped lead the team to top tier returns and strong growth. In particular, he is a leader of Transom Capital Group's operations team, which works closely with portfolio companies to unlock intrinsic value. In particular, Roenick is a strong critical thinker and problem solver.

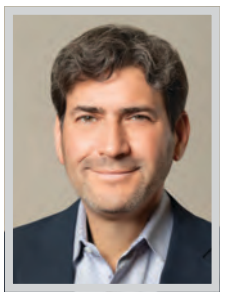
Outside of his daily work leading Transom Capital Group's growth and success, Roenick is also an active member of the Young Presidents' Organization, Santa Monica Bay Chapter.

TREVOR SALIBA

Managing Partner
NMS Consulting Inc.

Trevor Saliba is the founder, chairman, managing partner and global head of the M&A, Private Equity and Strategy practice groups of NMS Consulting, a management consulting firm with a global team of more than 350 professionals spread across 16 offices in USA, Asia, Europe and the Middle East and chairman of NMS Capital Group, a family office backed private equity investment firm that is ranked among the Top 25 private equity firms based on assets under management headquartered in Los Angeles. Saliba is a sought-after advisor working with a global client base with a specialized focus in the financial services, insurance, energy and infrastructure sectors.

Prior to NMS Consulting, Saliba began his financial services career at Morgan Stanley in 1995 and enjoyed an accomplished career as an investment banker specializing in mergers and acquisitions, cross border investment transactions and structured financings to public and private clients throughout the world.



MARTIN SARAFA

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 completion of 70 acquisitions, including 23 platform acquisitions and 47 add-on acquisitions. In 2020, Sarafa led the acquisition of a new platform, Accelalpha, a technology consulting firm focused on the implementation of Oracle products both in the cloud and on premise. Since then, Sarafa has led three add-ons for Accelalpha, including Prolog Partners, Key Performance Ideas, and LogistiChange. Sarafa also led the successful exit of The Mochi Ice Cream Company in January 2020.

CLEARLAKE

Congratulations Behdad Eghbali, Co-Founder and Managing Partner for being selected as one of the 2022 Los Angeles Business Journal's **Leaders of Influence**: **Private Equity Investors and Advisors**.

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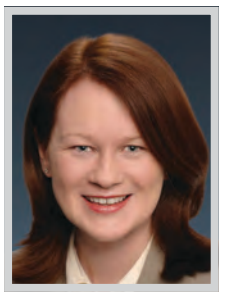
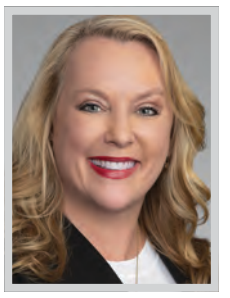


MARGARET SHANLEY

Principal; Transactional Services Practice Leader
CohnReznick

Margaret Shanley is known as a go-to partner in the middle market for transaction advisory services. She focuses on the middle market and on founder and family-owned businesses. During her 20+ year career, Shanley has led hundreds of transactions and maximized successful outcomes for buyers and sellers.

When advising on sell-side due diligence, Shanley partners with company owners as they are navigating a sale, enabling them to maximize value. When advising on buy-side due diligence, she partners with investors and company acquirers to successfully complete a transaction without undue burden on the target company. She focuses on ensuring there will be no surprises post-closing. Shanley is known as a connector and networker within the LA community, putting potential buyers and sellers in touch and helping to facilitate strategic relationships and introductions to other service providers, such as investment bankers and lawyers.



MONICA SHILLING

Partner
Kirkland & Ellis LLP

Monica Shilling is a nationally recognized private equity attorney. She advises many of the nation's top asset managers including Ares Management Corporation (Ares), Crescent Capital, Golden Gate Capital, Linden Capital Partners, Shamrock Capital, Owl Rock Capital, Oaktree Capital Management, and The Gores Group, in their private equity activities as well as their affiliated portfolio companies.

Shilling is also among a handful of attorneys across the country who actively represent specialty finance companies, with a focus on business development companies (BDCs) – regulated investment companies designed to help small and midsize companies meet their capital needs. Shilling is known for having the total skill set. She has extremely high levels of intellectual capacity, legal knowledge, common sense, people skills and M&A transactional experience. These qualities embody why she is not only a standout private equity advisor, but an invaluable business partner as well.

PATRICK SHIM

Managing Director
1927 Capital Management, LLC

Patrick Shim is a managing director of 1927 Capital Management, LLC, a family office in partnership with the Galleano family, a multi-generation winemaking family based in Southern California. The firm invests directly in private equity, venture capital, real estate, and other investment strategies through leading investment managers.

Previously, Shim was a managing director of investments at Mirae Asset Securities & Investments (USA), where he focused on a wide range of private equity and real estate investments, as well as the firm's strategic investment opportunities. Shim previously served on the board of directors of Foothill Family Service, a non-profit organization based in Pasadena, and currently serves as a Commissioner of the Planning Commission for the city of Upland, as well as a committee member of the city's Airport Land Use Committee. Additionally, Shim is an active member of The California Club, where he serves on its Advancement Committee.

AARON SOLGANICK

CEO
Solganick & Co

Aaron Solganick has built a successful investment banking firm in Solganick & Co. He has completed over $9 billion in M&A transactions to date and has an excellent reputation among his peers. Solganick is known for being a hard-working, deal-focused professional who endeavors tirelessly for his clients' success. He has been active in the Los Angeles deal community for approximately 20 years.

Solganick stands out as a leading investment professional largely because of his laser-focus on his industry sectors. He is also always willing to take a deep dive to learn as much as he can about the companies he represents. His clients appreciate his experience and knowledge in the software and tech-enabled service sectors and how he goes above and beyond for them. He also has created a worker-friendly environment at the firm where he encourages independent and creative thinking.

LOS ANGELES BUSINESS JOURNAL

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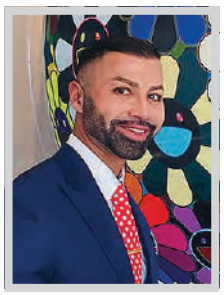
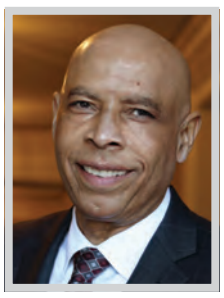


ALEX SOLTANI

Founder, Chairman & CEO
Skyview Capital

Alex Soltani founded Skyview Capital in 2005 and is chairman of the firm's executive and investment committees. He is a serial entrepreneur and started his first business when still a student at UCLA. Soltani brings extensive operational experience to his work in private equity. His strong business acumen and prescient investment instincts have led to successful acquisitions across a number of industries. Soltani is actively involved with every aspect of the transaction life cycle and plays a significant role in all of Skyview Capital's investments.

Prior to the formal establishment of Skyview Capital in 2005, Soltani worked at Platinum Equity, a multi-billion dollar Los Angeles-headquartered private equity firm specializing in corporate divestitures, public-to-private transactions and private sales. Skyview Capital was the first of a number of private equity firms created by former Platinum executives. Soltani serves as chairman of the Board of Directors for all Skyview Capital portfolio companies.

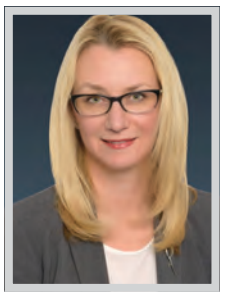


GEORGE SWAIN

Founder/CEO
GeorgeSwain Investments

George Swain is the founder and CEO of GeorgeSwain Investments (GSI). 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.

Swain's colleagues and collaborators say is that he is a visionary strategist. He has a broad range of experience in mergers and acquisitions, debt and equity financing and strategic partnerships. He and his team at GSI believe that greater diversity of investment vehicles and intermediary financial institutions can be developed to bridge the gap between money centers and full spectrum finance with respect to capital formation.

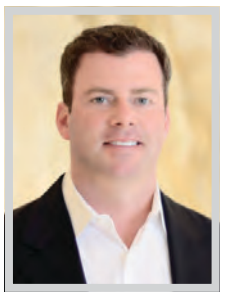


NATALIE TRONKINA

Partner
CohnReznick LLP

Natalie Tronkina has over 17 years of transactional advisory experience, focusing on performing quality of earnings and net working capital assessments, preparing pro-forma financial statements, performing profitability and bridging analyses and evaluating financial reporting infrastructures. She has advised on more than 250 transactions involving start-up and early stage companies, as well as established, mature businesses. She maintains long-term relationships with PE funds, investment bankers and business owners, who regularly come to her for help and advice.

Tronkina regularly works on engagements involving clients with complex business, transaction, and accounting issues. She is known as the go-to person for due diligence in transactions involving diverse industry clients focusing on technology-enabled services, SaaS, healthcare, business services and transportation and logistics. She has a deep understanding of the typical issues companies face in these industries and can very quickly identify leverage points and value-add points for her clients.

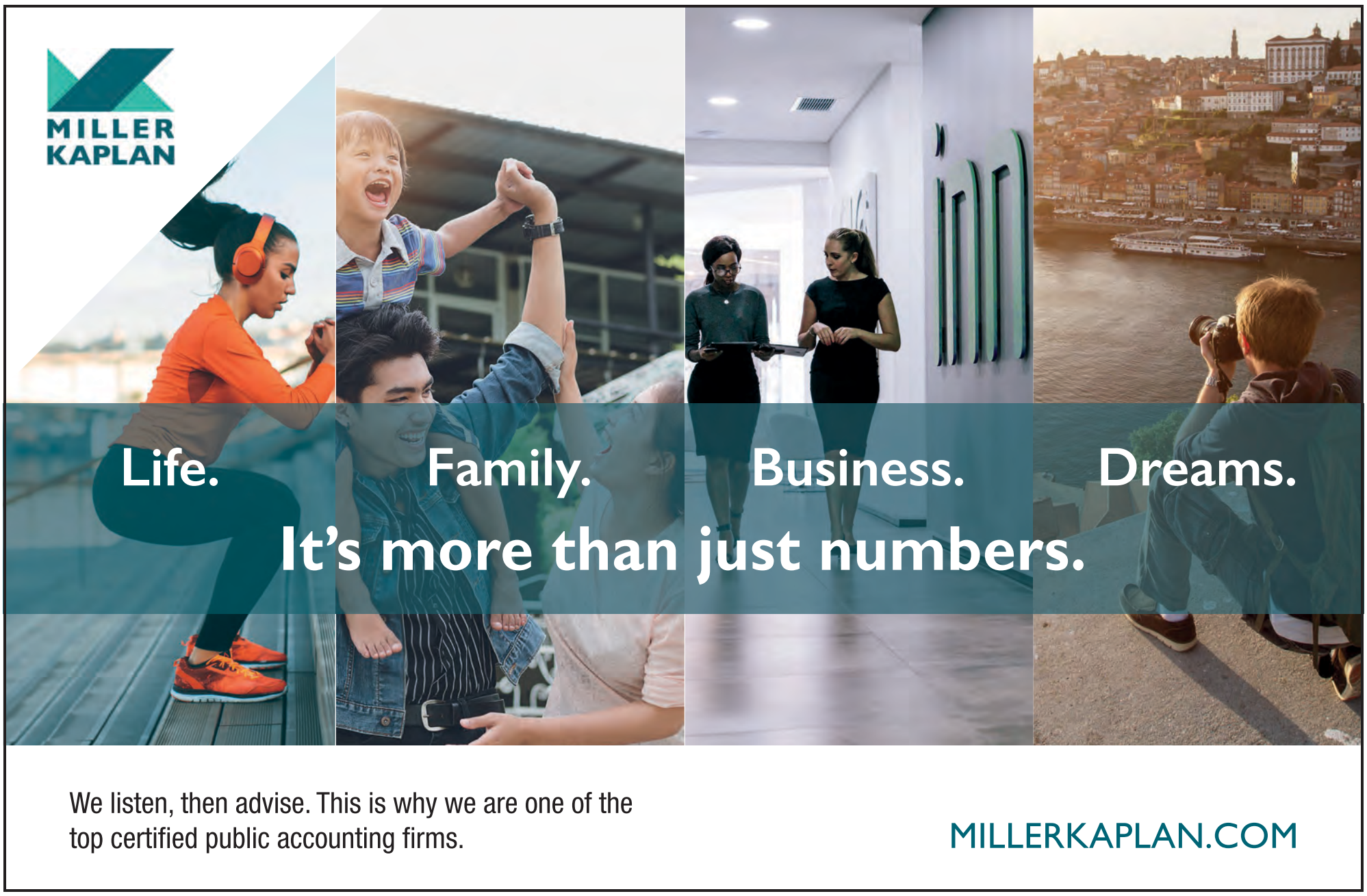


JEFF WHITE

Managing Director
Skyview Capital

Jeff White is managing director and head of business development at Skyview Capital, where he has been actively involved with all M&A efforts at the firm since its inception. He brings decades of experience that encompass private equity, investment banking and executive management. White has held critical positions at many distinguished firms, such as Merrill Lynch and Platinum Equity Holdings.

Prior to Skyview Capital, White was an integral part of Platinum Equity's multibillion-dollar global business development and M&A team. After Platinum Equity, White established and continues to successfully head up Skyview Capital's business development team. In addition, he is responsible for driving growth through acquisitions by identifying, negotiating and assessing all transaction opportunities within the M&A and business development team. White is also a member of the firm's investment committee. Recently, he expanded his role to help spearhead the firm's global M&A, strategic alliance and corporate development strategy.



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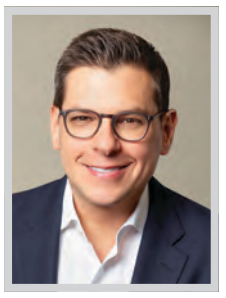
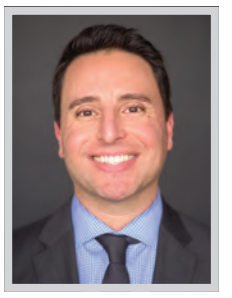


GUY ZACZEPINSKI

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 CJ Pony Parts, MCCi, Accelalpha, and Dominion Care.

Throughout his career, Zaczepinski has gained extensive experience analyzing and valuing companies for recapitalization, leveraged buyouts, mergers and acquisitions, and financial restructurings. He is a specialist in the Auto Aftermarket industry. In April 2021, Zaczepinski led Century Park's recapitalization of CJ Pony Parts, the market leader in the classic Mustang e-commerce space. In August 2021, Zaczepinski oversaw the successful exit of Covercraft Industries, Inc. to Audax Private Equity. Zaczepinski believes in a flexible and supportive approach in managing the firm's holdings, providing value-added experience and thoughtful insights into guiding high growth businesses.

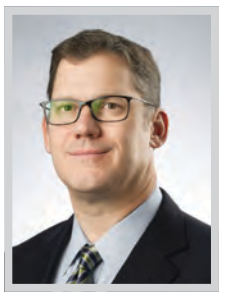


JONATHAN ZUCKER

Managing Director, Head of Capital Markets
Intrepid Investment Bankers

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

Since forming Capital Markets Group, Zucker has established trusting relationships with numerous clients who have returned to the firm for sell-side engagements after successful capital raises. For example, American Logistics Company (ALC) originally hired Zucker to complete a dividend recapitalization transaction in 2018 and subsequently tapped Intrepid for the sale of its student transportation division in 2020. Zucker advised another repeat client, Artisan Vehicles, through three capital raises before ultimately selling the business to Sandvik. He also advised professional skin care leader Obagi on its $150 million financing with TCW in 2021.



MARK ZYTKO

Co-Founder & Principal
Mesa West Capital

Co-founded in 2004 by Mark Zytko and Jeff Friedman, Mesa West Capital is a commercial real estate portfolio lender and a pioneer in the debt fund space. Part of the firm's success is its ability to continue expand its offerings while staying true to core values, principals that allowed Mesa West Capital to establish itself as one of the industry's leaders. The firm was one of the first managers to focus exclusively on commercial real estate debt when it debuted.

Zytko's belief and desire that Mesa West is constantly looking to evolve and grow its operation. Zytko and his team at the Los Angeles-based company showed its strength early in its history, as its debt strategy allowed the company to not just survive but thrive during the 2008 financial crisis. While equity investors were marking down their portfolios, Mesa West was protecting investor principal and paying out returns.

SEC Proposes to Enhance Private Fund Investor Protection

The Securities and Exchange Commission earlier this year voted to propose new rules and amendments under the Investment Advisers Act of 1940 (Advisers Act) to enhance the regulation of private fund advisers and to protect private fund investors by increasing transparency, competition, and efficiency in the $18-trillion marketplace.

"Private fund advisers, through the funds they manage, touch so much of our economy. Thus, it's worth asking whether we can promote more efficiency, competition, and transparency in this field," said SEC Chair Gary Gensler. "I support this proposal because, if adopted, it would help investors in private funds on the one hand, and companies raising capital from these funds on the other."

The proposed rules would increase transparency by requiring registered private fund advisers to provide investors with quarterly statements detailing certain information regarding fund fees, expenses, and performance.

Additionally, the proposed rules would prohibit private fund advisers, including those that are not registered with the SEC, from providing certain types of preferential treatment to investors in their funds and all other preferential treatment unless it is disclosed to current and prospective investors.

The proposed changes also would create new requirements for private fund advisers related to fund audits, books and records, and adviser-led secondary transactions.

The proposals also would prohibit all private fund advisers from engaging in several activities, including seeking reimbursement, indemnification, exculpation, or limitation of liability for certain activity; charging certain fees and expenses to a private fund or its portfolio investments, such as fees for unperformed services and fees associated with an examination or investigation of the adviser; reducing the amount of an adviser clawback by the amount of certain taxes; charging fees or expenses related to a portfolio investment on a non-pro rata basis; and borrowing or receiving an extension of credit from a private fund client.

In addition, the SEC proposed amendments to the Advisers Act compliance rule that would require all registered advisers, including those that do not advise private funds, to document the annual review of their compliance policies and procedures in writing.

The Securities and Exchange Commission proposed new rules and amendments under the Investment Advisers Act of 1940 (Advisers Act) to enhance the regulation of private fund advisers. The proposed new rules would:

- Require private fund advisers registered with the Commission to provide investors with quarterly statements detailing information about private fund performance, fees, and expenses;
- Require registered private fund advisers to obtain an annual audit for each private fund and cause the private fund's auditor to notify the SEC upon certain events;
- Require registered private fund advisers, in connection with an adviser-led secondary transaction, to distribute to investors a fairness opinion and a written summary of certain material business relationships between the adviser and the opinion provider;
- Prohibit all private fund advisers, including those that are not registered, from engaging in certain activities and practices that are contrary to the public interest and the protection of investors; and
- Prohibit all private fund advisers from providing certain types of preferential treatment that have a material negative effect on other investors, while also prohibiting all other types of preferential treatment unless disclosed to current and prospective investors. Additionally, the SEC is proposing to require all registered advisers, including those that do not advise private funds, to document the annual review of their compliance policies and procedures in writing.