

AMERICAN CAPITAL MARKETS GROUP

OVERVIEW

American Capital Markets Group offers comprehensive corporate advisory services to middle markets companies, advises on international business transactions, and supports the corporate finance activities of accountants, intermediaries and attorneys.

We provide a broad range of financial advisory services and act as financial consultants on financings, acquisitions, divestitures, corporate restructurings and reorganizations.

We offer unparalleled global resources and a multidisciplinary team of specialists through our affiliate Asia Pacific Capital Corporation, a leading merchant bank.

As professional advisors, we focus on relationships – not transactions – and we make it our business to help clients achieve their objectives.

MIDDLE MARKET COMPANIES

Refinancing, recapitalization, identifying appropriate capital structures, buying a business, selling off a division - these are significant challenges for a mid-sized companies as they see to initiate or respond to change.

OUR SERVICES

Mid sized companies often find it difficult to obtain single source, objective advice in developing and implementing finance strategies. They also need help in accessing financial institutions, domestic and foreign markets, joint venture partners and potential buyers and sellers of business. We can do the job.

Our Corporate Financial Consulting group offers middle market companies assistance with:

- Corporate financial planning
- Debt/equity strategies and funding
- Recapitalization
- Private Placement
- IPOs in the domestic and international markets
- Merger assistance
- Buyer screens
- Sale of a company or division
- Management buyouts
- Joint ventures/strategic alliances
- Appraisals/Valuation services
- Investor relations
- Licensing technology

FINANCIAL INTERMEDIARIES AND ATTORNEYS

As part of our advisory services, we interface directly with financial institutions and corporate attorneys.

Our objective in working with accountants, financial intermediaries and attorneys is to help them maximize the value of the services they provide to their clients.

Our highly qualified functional, technical and industry specialists serve as an extension of in-house capabilities and offer immediate consultation for important transactions.

We consult with financial intermediaries and attorneys on:

- Cross border transactions and international networking
- Comprehensive due diligence
- Mergers and acquisitions
- Buyer and seller screens
- Valuation and appraisal
- Financial modeling
- Turn arounds/reorganizations
- Financial instrument application and interpretation
- Investor relations

INTERNATIONAL CROSS BORDER BUSINESS TRANSACTIONS

International /cross border business opportunities play to our special strength. Utilizing our highly integrated networking of Asia Pacific Capital Corporation professionals and business contacts around the world, we work effectively across borders to structure transactions, establish joint ventures, secure licensing agreements and assist clients in sourcing capital.

Our unparalleled global perspective and extensive network of relationships and corporate clients allows us to identify opportunities without geographic constraints.

STABILITY

The years of experience of American Capital Markets Group is unsurpassed by any corporate financial consulting firm.

During the past 25 years, we have established a proven track record in managing or co-managing over \$5 billion in domestic and international transactions ranging in size from several million dollars to \$500 million per transaction.

We are a long-term player, seeking continuity in business relationships and delivering quality service to our clients wherever they do business. Our clients entrust us with the role of corporate financial advisors because they have confidence in our experience, professionalism and business judgment. We have earned their confidence because of our objectives and timely service.

Our reputation is built on helping our clients meet their objectives on time and within their budget.

CREATIVITY

Our proven experience gained from structuring numerous transactions, sourcing capital, establishing joint ventures and other consulting activities, is the foundation for our creativity. We constantly seek new strategies and innovative techniques to help our clients achieve their near and long-term objectives.

CONFIDENTIALITY

As a respected, independent professional services firm, we can make discreet inquiries to potential buyers, sellers and other third parties without revealing your identity or breaching client confidence.

GLOBAL CAPABILITIES

With the Asia Pacific Capital Corporation international network, we offer worldwide service capability. Our combined outstanding talent and excellent business connections in every major international market deliver outstanding service to our buyers.

OBJECTIVITY

Our professional reputation is built upon our objectivity and independence.

We generate ideas, which satisfy our clients' needs, not ours.

We do not take risk positions, lend or invest capital as principals or underwrite securities. Our fees are based on the value of professional services rendered.

EXPERIENCE

We offer an integrated team of experienced corporate finance, financial advisory, and appraisal and valuation specialists. These specialists have assisted hundreds of clients in meeting their corporate financial objectives.

CONTACTS

Extensive contacts with financing sources in the U.S. and around the world enable us to assist companies in sourcing capital in all major markets. Our global presence and large corporate database puts us in constant contact with potential buyers and sellers.

FINANCIAL SERVICES INCLUDE:

- International/cross-border networking with financial institutions and corporations.
- Finding international buyers/sellers
- Finding offshore capital sources for debt and equity transactions
- Due Diligence
- Investor Relations
- Structuring IPO's in international capital markets
- Financial instrument consulting

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