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**Tuesday - Thursday
November 16 - 18, 2021
JW Marriott Bonnet Creek Orlando**

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Welcome from the Chairs

On behalf of the members of the host chapter, ACG Orlando, and other ACG Florida Chapters – North Florida, South Florida and Tampa Bay, we welcome you to beautiful Orlando and the new JW Marriott Orlando Bonnet Creek for what we are confident will be both a fun and beneficial experience for you.

As we continue to navigate these uncertain times, it is exciting to be safely back-in-person in sunny Florida where you can find networking, programming and re-connect with middle-market deal makers from around the country.

We'd like to thank all of our sponsors and committee members for their support. Without them we would not be able to host the Southeast's premier for deal flow and networking.

Enjoy the conference, have some fun, and let's all do some deals!



Cathy McKenna

Shareholder
Vestal & Wiler
Orlando, Florida
407-843-4433
cmckenna@vestal-wiler.com

Catherine "Cathy" Sirkin McKenna is a Shareholder in the Accounting and Auditing services department at Vestal & Wiler. She has extensive public accounting experience, and utilizes that in her position as specializing in working as a liaison between venture capital groups and private companies in the Central Florida Marketplace. She has widespread experience in the industries of Technology, SaaS, Real Estate, Hospitality, Construction, Manufacturing, Management, Service Organizations, and Common Interest Realty Associations. Cathy also leads the firm initiative in serving the international market with experience in "International Financial Reporting Standards" (IFRS). She is also involved in auditing employee benefit plans. Cathy has significant experience in the performance of due diligence and business acquisition engagements. Cathy has been a speaker at UCF, accounting organizations, and client functions.

She is a graduate of the University of Central Florida obtaining a Bachelor in Science in Business Administration degree majoring in accountancy. Cathy is a member of the American and Florida Institutes of Certified Public Accountants

Prior to joining Vestal & Wiler in 2003, her public accounting background and experience includes serving as a Shareholder with a local accounting firm in Winter Park, Florida and ten years with Deloitte & Touche in the Orlando, Florida office.

Cathy is a graduate of Leadership Orlando. Her current and past community and professional involvement includes Board Member of Association for Corporate Growth, former member of Orange County Public Schools Foundation, former President and Board Member of Big Brothers/Big Sisters, Central Florida Chapter and volunteering at several Orange County Public Schools. She frequently lectures and teaches various groups on auditing, accounting and finance and specialty areas of accounting.



Nikee Schurig

Business Development Director –
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Nikee leads business development efforts across Central Florida for BDO, the world's fifth largest accounting and consulting organization providing assurance, tax, advisory and digital solutions to a wide range of publicly traded and privately held companies. Nikee has over 16 years of business development and account management experience within the financial services and capital markets sectors providing complex consultative solutions to clients in a variety of industries. Prior to joining BDO, Nikee worked in lower middle market mergers & acquisitions for close to a decade, and he is also a graduate of Leadership Orlando.

As a long-time member of ACG, Nikee has been honored to serve multiple turns on the Programming and SMART Award Committees, and he currently maintains a position on the Orlando Chapter Board of Directors. He is grateful for the impact that ACG has on the Florida business community. When not at the office, Nikee enjoys spending time with his family and in the weight room.



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SCHEDULE AT A GLANCE

Tues. Nov. 16	3:00 PM	Emerging Professionals Roundtable & Networking
	5:00 PM	Early Arrivals Reception
Wed. Nov. 17	8:00 AM	Shotgun Golf tournament (optional event)
	9:30 AM	Exhibit Hall opens for PEGs/IBs
	11:00 AM	Rest & Reset/Attendee Deal Lounge/ Sponsor Lounge Opens
	11:00 AM	Women's Forum Lunch – "Leading a Growing Company", Suneera Madhani, Founder & CEO, Stax (optional event)
	12:30 PM	Lite Lunch for Attendees
	2:30 PM	Breakout – "Transitions from Military Service to Business" with Tom Bowman
	4:00 PM	Welcome Speaker – "What's Coming for the Economy and Business in 2022?", James Marple
	5:30 PM	Capital Connection/All-invited Wine Tasting Reception
	9:30 PM	Late Night Dessert Party/ACG Florida Poker
	Thurs. Nov. 18	7:30 AM
7:30 AM		Exhibit Hall Opens for PEGs/IBs
7:30 AM		Breakfast Buffet
8:00 AM		The Power of DEI on Operational and Financial Success
9:15 AM		Breakout – "Employee's Health and the Impact on Business"
10:15 AM		Breakout – "Resolving the Supply Chain Squeeze on Portfolio Companies"
11:15 AM		Breakout – "Solving the Data Paradox"
12:30 PM		Lunch & Keynote Speaker – Jordan Belfort

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ACG Florida is a partnership of four Florida Chapters – North Florida, Orlando, South Florida and Tampa Bay. The Florida ACG Capital Connection® is held each year in November and moves around the state.



ACG® Orlando

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Registration

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Registration Desk

Griffin Foyer

The Florida ACG Capital Connection registration desk will be open on Tuesday, November 16th through Thursday, November 18th. Please stop by to pick up your nametag, get your conference bag and on-site guide, and ask any questions.

Hours of Operation

Tuesday, November 16, 1:00 PM - 7:00 PM

Wednesday, November 17, 7:00 AM - 7:00 PM

Thursday, November 18, 7:00 AM - 12:30 PM

Nametags by: Westshore Capital Partners

Conference bag by: PNC Business Credit

On-site guide by: McGriff



Our Focus:

- \$4-20mm of EBITDA
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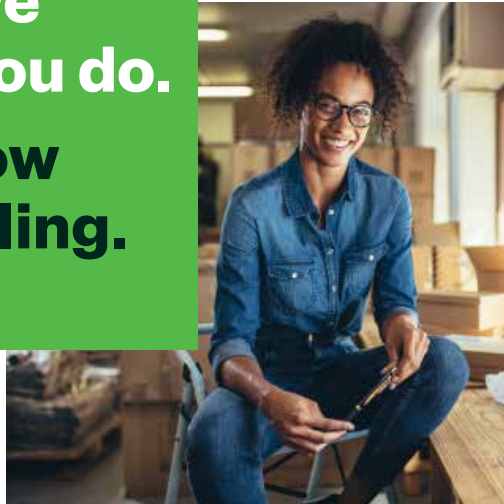
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Tuesday, November 16

1:30 – 5:00 pm **CEO Event (invitation only)**

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This invitation only opportunity is reserved for select CEOs statewide whose corporations meet a strict criterion. Four roundtable sessions, individually designed to bring an educational component, will be available over a two-hour period. The discussions center around:

- *Private Equity control and minority investments*
- *Investment Banking services*
- *Family Office focused investments*
- *Fractional CFOs*

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3:00 – 5:00 pm **Emerging Professionals Roundtable & Networking**

Magnolia

“A Roadmap for Young Professionals – Experienced Professionals Share Advice on the Road to Success”

Get to know the other Young Professionals (under 35) that are attending the Florida ACG Capital Connection, prior to our Early Arrivals Reception at 5:00 pm on Tuesday.

Attend this Roundtable of seasoned professionals who will provide a brain to pick, an ear to listen and a push in the right direction, including advice on navigating the system and other ways to advance their careers.

Roundtable from 3:00 to 4:00 pm; Networking and Cocktails from 4:00 to 5:00 pm.

5:00 – 7:00 PM **Early Arrival's Reception**

illume

Make your first connections at our Early Arrival's Reception. Enjoy cocktails and appetizers in a beautiful atmosphere at illume, the rooftop restaurant at JW Marriott Orlando Bonnet Creek.

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Wednesday, November 17

8:00 am Scramble Golf tournament (optional event)

Waldorf Astoria Golf Course

Transportation from JW Marriott to Waldorf Astoria Golf Course will be provided by a continuous shuttle beginning at 6:45 am

Continental breakfast, check-in, range balls from 7:00 to 7:50 am

Shotgun start at 8:00 am

Boxed lunch provided

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9:30 am Exhibit Hall opens for PEGs/IBs

Griffin D/E

Let the Deal Making begin! The Exhibit Hall is open for all PEG and IB exhibitors who have tables in the room to begin their pre-scheduled or impromptu meetings.

11:00 am Rest & Reset/Attendee Deal Lounge/Sponsor Lounge Opens

Event Hub & Griffin Foyer

Throughout the conference you can enjoy our Rest & Reset Lounge where you can get your headshot updated for social media/company website or get a quick neck massage to relieve some stress.

The Attendee Deal Lounge and Sponsor Foyer is a great place to grab a quick meeting with someone and also meet our sponsors.

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*Attendee Deal Lounge
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Conference Schedule

Wednesday, November 17 (continued)

11:00 AM Women's Forum Lunch – "Leading a Growing Company"

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Suneera Madhani, Founder & CEO, Stax

Suneera Madhani is founder and CEO of Stax by Fattmechant. Under her leadership, Stax has catapulted from startup to eight figures in revenue, and Suneera has become a notable minority female entrepreneur raising over \$100 million in venture capital. A technology innovator and proven leader, Suneera Madhani was recognized as the 2018 Most Influential Woman in Payments and a 2020 honoree of Fortune's prestigious 40 Under 40 list. Suneera has spoken at national fintech, tech and payments conferences such as Money 20/20, Collision and TedX. She is also an active writer for Forbes, Inc. and the Entrepreneur network.

11:00 am - networking

11:30 am to 1:00 pm - lunch and presentation

1:00 to 2:00 pm - mixologist

12:30 pm Lite Lunch

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Not having lunch at the golf course or the Women's Forum? We have the answer for you. Join us in the Griffin Foyer for a quick bite to fuel you for the afternoon.

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- Revenues between \$8 million and \$100 million
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- Owners and management with a vision for future growth
- Stable demand for products or services

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Wednesday, November 17 (continued)

2:30 – 3:30 pm Breakout – “Transitions from Military Service to Community and Business: Challenges and Opportunities”

Spruce



**Thomas G. Bowman,
7th Deputy Secretary of
The U.S. Department of Veterans Affairs**

Tom spent 19 years in the Veterans Administration. Prior to his appointment as the Deputy Secretary, he served as a prosecutor, defense counsel and Law Center Director for the Marine Corps, and an Assistant District Attorney for the Southeastern Massachusetts. His legal career has centered around Military and Veterans issues. Tom retired from the Marine Corps as a colonel and is a Veteran of the Gulf and Vietnam war. Upon his retirement with the VA, Tom founded TGB Strategies LLC, a consulting firm based in Washington DC that assists businesses throughout the country on doing business with the VA and DOA.

4:00 – 5:00 pm Welcome Speaker – “What’s Coming for the Economy and Business in 2022?”

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**James Marple
Managing Director &
Senior Economist
TD Bank Group**

James Marple is a Managing Director and Senior Economist with TD Bank Group. In his role, he leads a team of economists to provide policy analysis and forecasts to TD clients and stakeholders. The team delivers on a wide scope of research, covering the U.S., Canadian, and global economies.

As a respected commentator, James gives presentations across North America speaking on economic and financial trends. He is interviewed frequently on the radio, television and in print.

Prior to joining TD Bank Financial Group, James worked as an economist for the Ontario Ministry of Finance. He holds an Honours Bachelor of Arts degree in Economics from the University of Alberta and a Master of Arts degree in Economics from the University of Toronto.

James currently serves on the Board of the Toronto Association for Business and Economics (TABE). In October 2021, he will celebrate his fourteen-year anniversary with TD Bank Group.

Conference Schedule

Wednesday, November 17 (continued)

5:30 – 7:30 pm Capital Connection/All-invited Wine Tasting Reception

Griffin C/D/E

Enjoy some exceptional wines poured by our PEG and IB exhibitors at the Florida ACG Capital Connection's signature event. It's an opportunity for you to meet our exhibitors for that quick introduction.

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7:30 pm Attendees on own for dinner

9:30 pm Late Night Dessert Party/ACG Florida Poker Tournament

Unreserved Beer Garden

After dinner make sure you join us for desserts, cocktails and games. We will have a dart board, foosball, and OF COURSE our ACG Florida Texas Hold'em poker tournament. Give a try and winning the coveted poker trophy!

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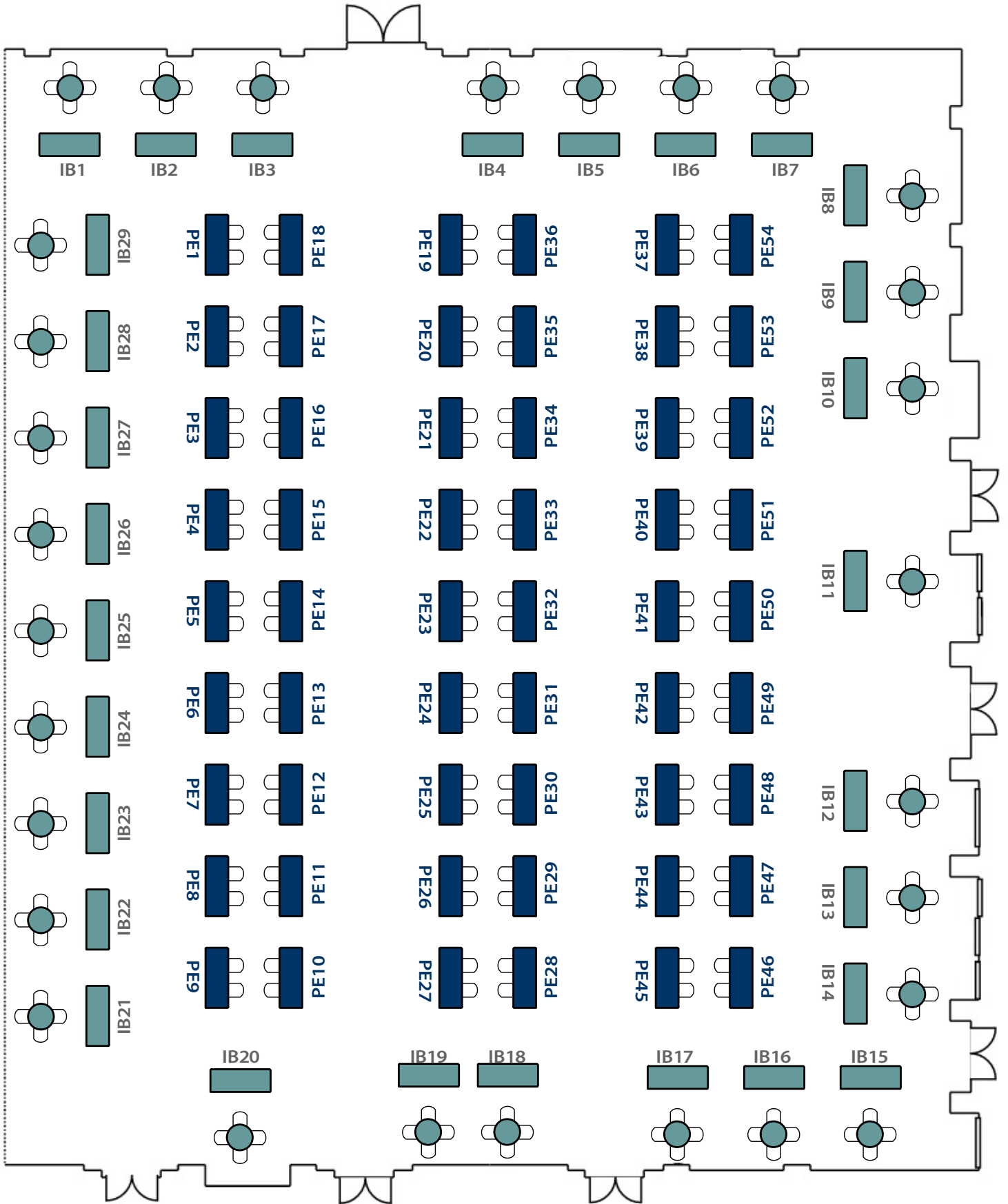
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IB1	7 Mile Advisors	IB11	Harwood Capital	IB19	Miller Advisory Corp
IB2	Aberdeen Advisors	IB12	Houlihan Capital	IB20	Pickwick Capital
IB3	BRG	IB13	Hyde Park Capital Advisors (table 1)	IB21	Piper Sandler
IB4	Carriage Hill Inc.	IB14	Hyde Park Capital Advisors (table 2)	IB22	SMBC Nikko
IB5	Cogent Capital Advisors	IB15	James Capital Advisors	IB23	Vaupen Financial Advisors
IB6	Commercial Finance Partners	IB16	LCG Advisors	IB24	Windsor Capital
IB7	CRI Capital Advisors	IB17	Links Financial	IB25	Legacy Wealth Capital
IB8	CriticalPoint Partners	IB18	Mesirow	IB26	TruSight, LLC
IB9	Growth Capital Advisors			IB27	Benchmark International
IB10	Harbor View Advisors			IB28	Rush Street Capital

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PE3	Carousel Capital	PE21	Kirtland Capital Partners	PE39	Rolling Bridge Capital
PE4	Chatham Capital	PE22	KLH Capital	PE40	Route 2 Capital
PE5	City National Bank	PE23	LongueVue Capital	PE41	Seacoast Capital
PE6	Comvest Partners	PE24	Main Street Capital	PE42	Shoreline Equity Partners
PE7	Cyprium Partners	PE25	MiddleGround Capital	PE43	Stonehenge Partners Inc.
PE8	Deerpath Capital Management	PE26	Midwest Mezzanine Funds	PE44	Tecum Capital Partners
PE9	Dubin Clark & Company Inc.	PE27	New Water Capital	PE45	Tenex Capital Management
PE10	EBSCO Capital LLC	PE28	Northcreek Mezzanine	PE46	The Anderson Group
PE11	Excellere Partners	PE29	O2 Investment Partners	PE47	The Edgewater Funds
PE12	Fort Point Capital	PE30	Osceola Capital Management	PE48	Thompson Street Capital Partners
PE13	TBD	PE31	Parkway Capital	PE49	Trivest Partners L.P.
PE14	Gen Cap America	PE32	Peninsula Capital Partners	PE50	Vance Street Capital
PE15	Gladstone Companies	PE33	PGIM Private Capital	PE51	Westshore Capital Partners
PE16	Graham Partners	PE34	PNC Riverarch Capital	PE52	White Wolf Capital
PE17	HealthEdge Investment Partners LLC	PE35	Hidden Harbor Capital Partners	PE53	WILsquare Capital
PE18	High Street Capital	PE36	Prudential Private Capital (PPC)	PE54	GenNx360 Capital Partners



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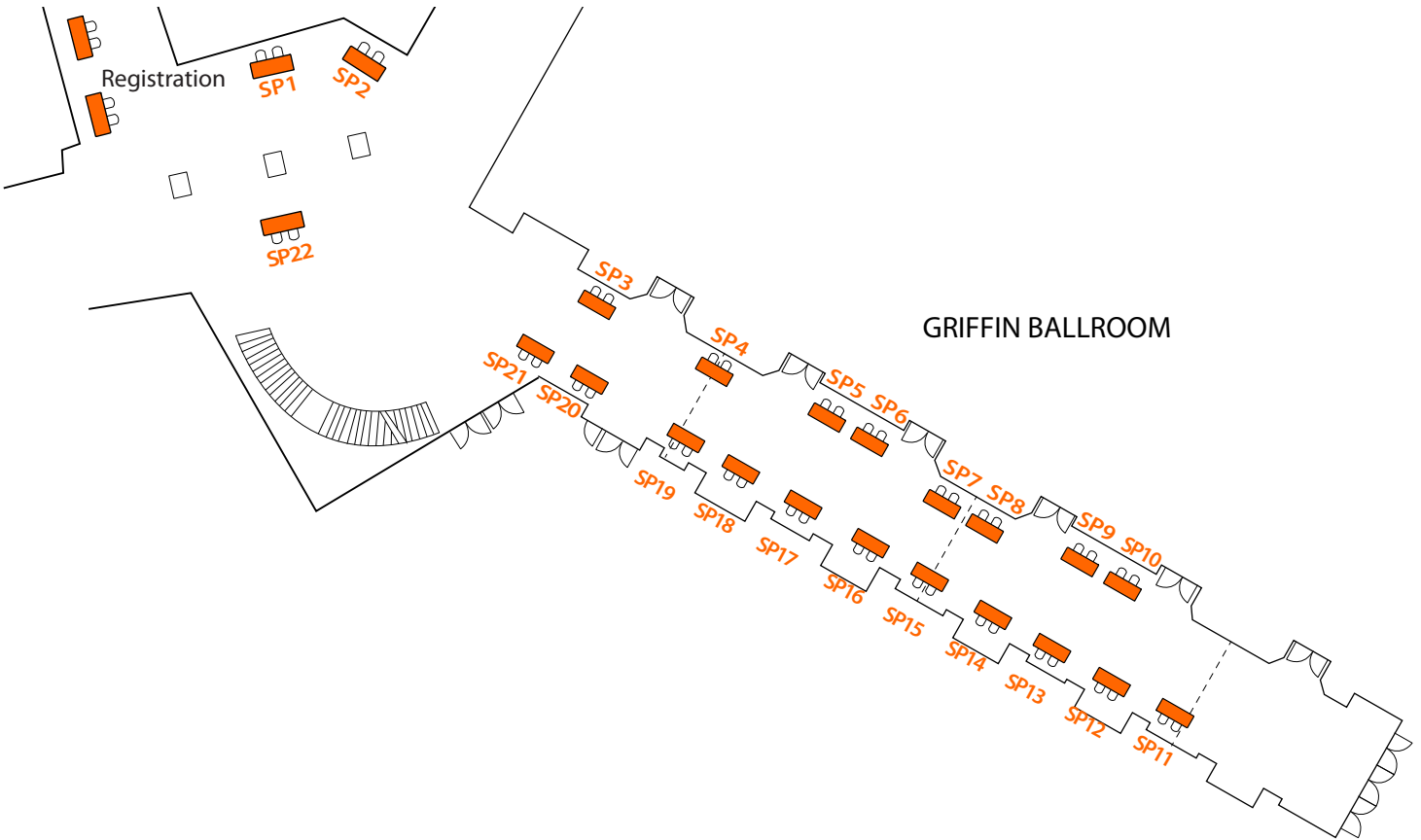
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VISIT OUR BOOTH

Conference Schedule

Thursday, November 18

7:30 am Rest & Reset/Attendee Deal Lounge/Sponsor Lounge Opens

Event Hub & Griffin Foyer

Continue to enjoy our Rest & Reset Lounge – don't forget to update your headshot or get a quick neck massage. Have an impromptu meeting and say hi to our sponsors.

7:30 am Exhibit Hall Opens for PEGs/IBs

Griffin D/E

Deal making continues.

7:30 – 8:30 am Breakfast

Event Hub & Griffin Foyer

Whether you want a full breakfast or just a cup of coffee and a bagel, grab some morning fuel and network in the attendee lounge or exhibit hall or attend the Breakfast panel.

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8:00 – 9:00 am "Hair of the Dog" Bar

Event Hub

Did you stay up too late last night playing poker with ACG Florida? Or were you networking with our over 500 attendees? Or are you just not a morning person? LCG Advisors has the cure - energy drinks, mimosas and bloody marys. That should help you get through the day.

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The advertisement features a background image of a chess knight. At the top left is the STRATEGY Partners Group logo. Below it are the logos for Marsh McLennan Agency and Chief Outsiders. The main text reads "Experienced Operational Deal Support" in large white font on a dark green background. Below this is a white horizontal line, followed by the text "Increasing deal closure rates. Maximizing speed and quality of post acquisition integration." in white font. Another white horizontal line is below that, and at the bottom is the website "WWW.STRATEGYPG.COM" in white font.

Thursday, November 18 (continued)

8:00 – 9:00 am Breakfast Panel – “The Power of DEI on Operational and Financial Success”

Griffin A/B

Today’s increasingly competitive business environment requires investors, acquirers and business leaders to swiftly identify and execute on opportunities to optimize, innovate, and grow businesses.

ACG Florida Capital Connection is delighted to host a candid discussion by three leading authorities on leveraging Diversity Equity & Inclusion (DEI) as a tool to drive operational excellence and boost firm performance within the middle market and in M&A. We will explore:

- *DEI and its role in driving business goals,*
- *The process of DEI versus the event of DEI*
- *How business value is created through DEI both generally and within M&A*
- *The growing candidate supply/demand imbalance and understand the impact of DEI on employee recruitment and retention*

- *Identifying and investing with undercapitalized founders and innovators*
- *What does success in DEI effort look like.*



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Herschel Frierson, Principal, Crowe LLP

Rich Grant, Director, Business Development, Northlane Capital Partners

Kelli N. Jones, Co-Founder and General Partner, Sixty8 Capital

Brian Zophin, Partner, Crowe LLP (Moderator)



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Thursday, November 18 (continued)

9:15 – 10:00 am Breakout – “Employee’s Health and the Impact on Business”

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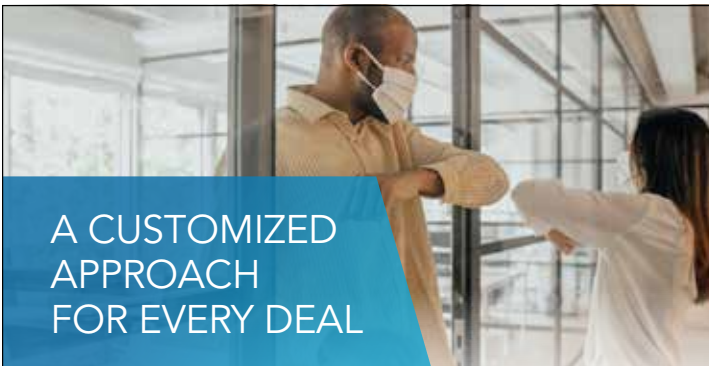
Please join us for a Panel discussion with Forward-thinking leaders about lessons learned from the pandemic, and how this knowledge can be used to build a healthier future.

Panelists will provide updates on the industry, methods for attracting and retaining talent as well as employee’s wellbeing and the impact on businesses.

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Thursday, November 18 (continued)

10:15 – 11:00 am Breakout - “Resolving the Supply Chain Squeeze on Portfolio Companies”

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Dan Ambrico
President and CEO, LSQ

Come hear how the PE companies and investment bankers can think about the macro of supply chain disruptions and the landscape of solutions in the market.

Dan Ambrico is currently President and CEO at LSQ, a role he has held since 2017. Dan started at LSQ in 2015 as Chief Strategy officer overseeing strategic initiatives, partnership development and product expansion.

Prior to joining LSQ, Dan spent 15 years in investment research roles at stops including JP Morgan, Goldman Sachs and Level Global. Dan currently lives Orlando with his family.

11:15 am – 12:00 pm Breakout – “Solving the Data Paradox”

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The amount of data companies have continues to grow exponentially and making sense of it is a daunting task ... “too much data, but no information”.

This breakout session will explore the challenges of and keys to automating end-to-end financial and operational data management and reporting processes faced by middle market companies. This is the wave of the future and in the wake of resource constraints, new technologies are becoming more democratized and can be a strategic game changer for companies.

Our planned panel will include industry and academic leaders who are successfully developing and implementing digital solutions in today’s fast-paced market.



Tom Aleman
Professor of Practice,
Accounting Analytics,
Wake Forest University



Sanjay Bharwani
Managing Director,
Advisory Services
Ernst and Young



Omar Khanataev
CEO,
AmeriBest Home
Care, LLC



Alexandra (Alex) Mores
Managing Partner and
Founder of Atlantix
Partners

Thursday, November 18 (continued)

12:30 pm **Lunch & Keynote Speaker - Jordan Belfort**

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Jordan Belfort

In the 1990s, Jordan Belfort built one of the most dynamic and successful sales organizations in Wall Street history. To this day, his proprietary sales training techniques and daily motivational speeches are the stuff of legend – earning him a reputation as a ‘motivator without peer.’

*His life story has been turned into the blockbuster feature film: *The Wolf of Wall Street*, with Leonardo DiCaprio playing the role of Belfort and directed by Martin Scorsese.*

*And his **Straight Line Sales & Persuasion System** has been tested and proven to transform virtually any individual (regardless of age, sex, educational background, or social status) into a world-class closer and top producer in their field.*

Today, his life represents the ultimate redemption story. After surviving his rise and fall as an American entrepreneurial icon, he is now a world-renowned motivational speaker and sales trainer who assists both people and organizations in breaking through barriers on the path to achieving measurable, lasting success. And as a top business consultant, Belfort has worked with over 50 public companies and multiple Fortune 500 brands, including IBM, Virgin Airways, & the John Maxwell Team.

*He is the subject of a Billboard-charting hit song: Jordan Belfort and his social media presence is robust, with 2.3 million TikTok followers, 1.6 million Instagram followers, and over 5 million total followers around the globe. Jordan is also the host of the fastest-growing business podcast on Apple (*The Wolf’s Den*).*

His three bestselling books have been published in 22 countries and translated into 18 different languages. And he is a frequent guest commentator on CNN, CNBC, and the BBC. At home, Jordan is a beloved and dedicated family man. He is the proud father of three wonderful children: Chandler, Carter, and Bowen.





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Our commitment goes beyond financial support as we believe in establishing a collaborative team of peers, all of whom have a hand in the company's progress. When we combine management's industry and operational expertise with our own, the company's full potential is unlocked, and value is created.

Since its founding, KLH Capital has raised \$520 million. For more on our investment approach, please visit our website: www.klhcapital.com.



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