

THE INDEPENDENT SPONSOR FORUM

2026
Sponsorship
Opportunities

**Elevating the brand
and effectiveness of the
independent sponsor asset class in
the lower middle market ecosystem.**

WHAT IS THE ISF?



The **Independent Sponsor Forum (ISF)** was launched in 2023 in partnership with the Small Business Investor Alliance (SBIA) **as the only vetted membership community developed exclusively BY and FOR independent sponsors.** Supported by an active Steering Committee of leading lower middle market investors, ISF has created a high-quality, carefully curated and efficient initiative that is purpose-built to meet the rapidly evolving needs of this asset class. In the first two years of operations, ISF has gained remarkable market traction, garnering over 400 vetted members and selling out each of its Deal Series events. Bringing its mission to life, ISF has launched:

- **The ISF Deal Series:** Invite-only, one-day events bringing pre-screened independent sponsors and capital providers together for efficient 1:1 meetings.
- **Emerging Independent Sponsor Boot Camps:** Immersive, one-day education experiences designed for independent sponsors, with qualifying professional backgrounds, who are pursuing their first deal or have completed their first or second deal.
- **Peer-to-Peer Roundtables:** Virtual and in-person opportunities to connect with independent sponsor peers in a candid, confidential setting to exchange best practices, collaborate on solutions to industry challenges, and build relationships.
- **ISF Insights:** A monthly newsletter sharing thought leadership, reports and data, policy updates and more.
- **Focused Educational Webinars:** Digital Lunch & Learn virtual events offer focused discussions with experienced professionals on a sponsor-selected topic.



Get Involved

Increase your visibility in a target rich environment where you can demonstrate your firm's expertise with a rapidly growing segment of the market.

2026 Opportunities
Four (4) Deal Series Events
Two (2) Boot Camps
Focused Educational Webinars

2025 Accomplishments: Year in Review

With four high-quality, sold-out Deal Series events, we are eager to lay the groundwork for an even more impactful 2026.



Who are the members of ISF?

The Independent Sponsor Forum currently has **249** vetted independent sponsor firms representing **462** individual members. Most members have a background in private equity, corporate development, industry/operational experience or investment banking.

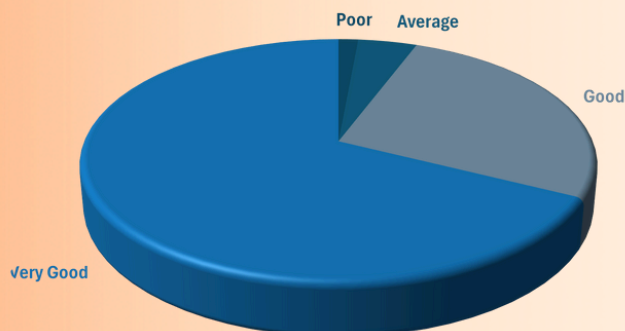
By The Numbers

- **5,200+** One-to-one meetings
- **1,300** Deal Series Attendees
- **73** Boot Camp Attendees
- **52%** Independent Sponsor Event Attendees
- **48%** Capital Provider Event Attendees

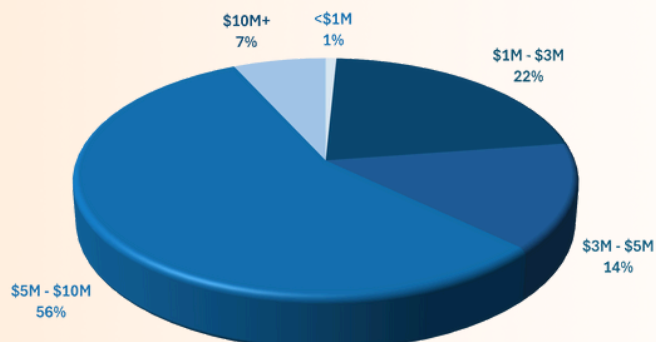
**“PERFECT BALANCE IN SIZE
– LARGE ENOUGH TO CREATE
MEANINGFUL NETWORKING
OPPORTUNITIES, YET
INTIMATE ENOUGH TO FOSTER
REAL CONNECTIONS.”**

*Trevor Harnett, CIMA
ISF Chicago Attendee*

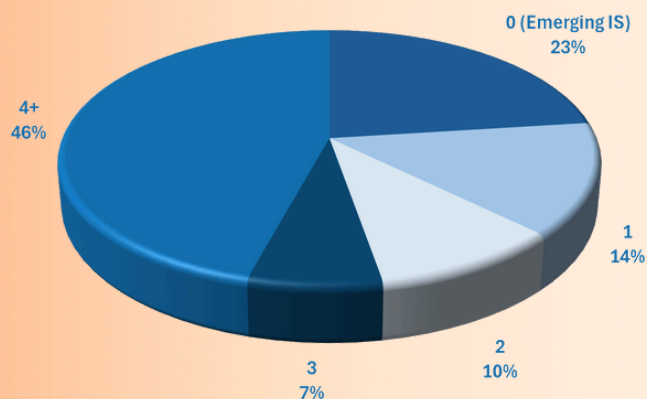
1:1 MEETING QUALITY



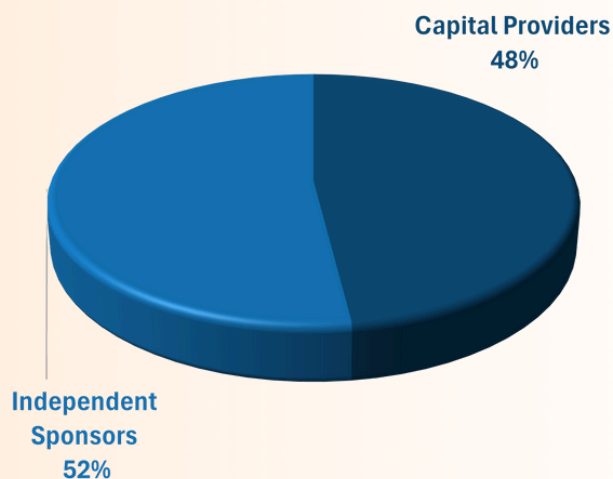
TARGET DEAL SIZE



DEALS CLOSED BY OUR INDEPENDENT SPONSORS



EVENT ATTENDANCE



Overview of ISF Deal Series

All ISF Deal Series events have become a sought after alternative for lower middle market dealmakers seeking a higher ROI, vetted attendees and more efficient format.

- Open by invitation only to pre-screened capital providers and independent sponsors, ensuring each participant that their time will be well spent and yield the highest return.
- Vendor involvement is restricted to a limited number of ISF sponsors.
- Efficient one-day format of 1:1 meetings between capital providers and independent sponsors.
- Fireside chats focus on unpacking current market challenges and/or opportunities.
- Organized in different regions across the country, the ISF Deal Series timing is designed to match the natural cadence of deal flow.

There are currently four Deal Series events lined up for 2026 in the following cities:

- Dallas
- Philadelphia
- Chicago
- Los Angeles

Sample Agenda

8:00am	Registration & Networking Breakfast
9:00am	1:1 Meetings (4)
10:30am	Fireside Chat
11:00am	1:1 Meetings (4)
12:30pm	Luncheon
1:00pm	Roundtable Discussions
2:00pm	1:1 Meetings (4)
3:30pm	Fireside Chat
4:00pm	1:1 Meetings (3)
5:00pm	Networking Reception

**“BY FAR THE BEST
INDEPENDENT SPONSOR
AND CAPITAL PROVIDER
MEET UP I'VE BEEN TO.”**

ISF LA Attendee



Overview of ISF Emerging Independent Sponsor Boot Camp

The ISF Emerging Independent Sponsor Boot Camp is always hosted the day prior to a Deal Series event. It is an immersive executive education style initiative launched in September 2024 with great success. Developed by leading independent sponsors leveraging their deep expertise, ISF Boot Camp is designed to provide those who are newer to the strategy with critical insights, best practices, effective strategies, valued networks and frameworks for success.

Curriculum

The one-day curriculum guides attendees through understanding and planning for the unique challenges and opportunities presented when investing on a deal-by-deal basis without a committed fund. The curriculum covers:

1. What It Takes to Become an Independent Sponsor – Investment Frameworks, Commitment & Strategies
2. Models for Sourcing Your Deals & Adding Value
3. Types of Capital in the Market and Building Your Capital Stack on a Deal by Deal Basis
4. IOI & LOI: Nuances of Staging Diligence & Negotiating the Deal
5. Sourcing Capital, Structuring the Deal & Understanding What's Market in Deal Terms
6. Key Governance Considerations & Alignment of Interests Unique to Independent Sponsor Led Deals
7. Independent Sponsor Strategies for Growing the Business with an Exit in Mind

There are two Boot Camps scheduled for 2026. These will occur in conjunction with the Deal Series events in:

- Dallas
- Chicago

**“GREAT CONFERENCE
DESIGNED WITH THE
INDEPENDENT SPONSOR IN
MIND FIRST. QUALITY PEOPLE
AND GREAT CONNECTIONS!”**

Alan Baca, Verde Equity Partners



Meet the ISF National Steering Committees

Capital Provider Steering Committee

Albert Alexander

Director, Bluehenge Capital

Les Alexander

Partner, Jefferson Capital Partners

Christopher Ayala

Managing Director, Trident

Cameron Coley

Principal, Plexus Capital

Jason Cunningham

Vice President, Argosy Private Equity

David Fang

PE Investment Officer, Unity Hunt Family Office

Simon Haidamous

Managing Director, Genesis Park

Casey Hammontree

Partner, Resolute Capital Partners

Matthew Harnett

Partner, Tecum Capital

Mark Hollis

Senior Partner, Centerfield Capital Partners

Aaron Katzman

Vice President, Route 2 Capital Partners

John Kim

Partner, New State Capital Partners

Brian Kinsman

Senior Advisor, HCAP Partners

Rob Kissling

Principal, Source Capital

Grant Kornman

Partner, Align Collaborate

Michael Kornman

Partner, Align Collaborate

Doug Lancey

Managing Director, Tamarix Capital Partners

Lee Lowicki

Managing Director, ACE & Company

Cliff Meijer

Managing Director, Headway Capital Partners

Todd Morris

Managing Director, True West Capital Partners

John Pontius

Partner, Capital Alignment Partners

Mark Rafavolich

Director, Merion Investment Partners

Alexis Rathborne

Managing Director, Trident

Joe Rodgers

Managing Director, Source Capital

Kenneth Saffold

Managing Partner, o15 Capital Partners

Tyson Smith

Partner, Tecum Capital

William Timmerman

Managing Principal, Graham Capital Investments

Tim Welles

Managing Partner, Pine Street Capital Partners

J.D. White

Managing Principal, MB Global Partners

Paul Witinski

Partner, Ironwood Capital

Stacey Wittelsberger

Partner, Patriot Capital

Brinda Yohannan

Managing Director, First Haven Capital

Brian Yoon

Managing Director, Corbel Capital Partners

Jacques Youssefmir

Partner, Ocean Avenue Capital Partners

Meet the ISF National Steering Committees

Independent Sponsor Steering Committee

David Acharya*

Founder & Managing Partner, Acharya Capital

Omar Akbar*

Partner, Aperion Management

Richard Baum*

Managing Partner, Consumer Growth Partners

Justin Benshoof

Founder & Managing Director, Cervano Capital

Alejandro Capetillo*

Partner, Agile Growth Equity

Max DeZara*

Founder & Managing Partner, Akoya Capital

Erik Ginsberg*

Managing Partner & Co-Founder, Slate Capital Group

Griffin Gordon

Founder & CEO, Taurus Capital Partners

Bonnie Harland

Director, Pouschine Cook Capital Management

Sam Henderson*

Co-Founder & Managing Partner, Hullson Partners

Bruce Lipian*

Managing Director, StoneCreek Capital

Chris Melton

Founder & CEO, The White Oak Group

Tom Parro

Founder & President, MERK Capital

Jeffrey Piper*

Managing Director, LXP

Scott Seelbach

Partner, Clarity Growth Partners

Michelle Sherlock

Principal, Investor Relations, Hemingway Capital

Omar Simmons

Managing Partner, Exaltare Capital Partners

Mike Skaff

Managing Director, Seneca Partners

Darren Snyder*

Partner, Fremont Growth Partners

Douglas Song*

Managing Partner, Prodos Capital LLC

Franklin Staley

Managing Director, Exeter Street Capital Partners

Dan Tamkin

Founder & Managing Partner, Resurgent Capital Partners

Josh Welk*

Founder & Managing Partner, Full Guard Capital

Max Young

Partner, Elan Growth Partners

**Denotes Boot Camp Faculty & Advisors*

“ISF NETWORKING EVENTS ARE A GOLDMINE FOR INDEPENDENT SPONSORS SEEKING TO BUILD VALUABLE CONNECTIONS AND UNLOCK GROWTH OPPORTUNITIES.”

David Acharya, Acharya Capital Partners

SPONSORSHIP OPPORTUNITY ^[1]

Patron Sponsor: \$16,500 per ISF Deal Series event | **Boot Camp** \$5,500 per add-on
A deeply valuable opportunity to increase visibility, drive brand awareness, demonstrate expertise and expand your reach within the growing independent sponsor community.

- Highly limited: Six (6) sponsors per event and two (2) per industry.
- Participate in a content session or host a luncheon Roundtable Discussion. Content topics will be driven by community needs.
- Dedicated exhibit and meeting table.
- Receive custom invitations and discounts to invite clients and prospects to this invitation-only event.
- Logo and brand visibility on website, social media, emails, 1:1 meeting app and signage.
- Advance copy of attendance list to plan your business development.
- Two (2) registrations* to the sponsored event.

**Additional registrations are available for purchase if space allows.*

Boot Camp Add-On:

- Boot Camp is taught solely by Independent Sponsors, however sponsors that add a Boot Camp sponsorship have the opportunity to attend the luncheon and closing reception, introduce themselves at the close of the day, distribute materials, refer prospects, and host post-Boot Camp virtual technical sessions on legal, capital provider and diligence aspects of IS dealmaking.

Premier Sponsor: \$12,500 per Deal Series event | not eligible for Boot Camp add-on

- Logo and brand visibility at the event, in email marketing and on website.
- Sponsored WiFi - with your company name as the password for attendees.
- Branded charging stations with your logo.
- One (1) attendee pass for the event.
- In addition, you will get one branded webinar for ISF members that you can moderate. You would work with ISF on the topic and content - ISF handles all of the heavy lifting on hosting/marketing!

Contributing Sponsor: \$5,500 per ISF Deal Series event
(PLEASE NOTE: *Only for private capital provider funds.*)

- Discounted invitations for clients and prospects (subject to committee vetting).
- Logo and brand visibility on website, social media, emails, 1:1 meeting app, and signage.
- Advance copy of attendance list.
- One (1) registration to the sponsored event.



[1] Please note that ISF staff retains final approval authority on all matters associated with each regional forum.

ADDITIONAL SPONSORSHIP OPPORTUNITIES

If you are looking to connect with this rapidly growing community, the Independent Sponsor Forum now offers these unique opportunities to make connections, build leads and reinforce your brand, including:

Focused Educational Webinars: \$5,500 per webinar

Sponsors have the opportunity to conduct educational webinars focused on a specific topic. ISF staff will work with sponsors on topics, as well as set up, moderate and market the webinars. *Deliverables: Attendee list/information, moderating opportunities, email marketing, webinar branding, and branded post-event articles posted on LinkedIn.*

Topics include, but are not limited to:

- Board Creation and Management
- Broken Deal Fees – Navigating and Negotiating
- Due Diligence as an Independent Sponsor
- Fundraising Strategies
- HR Issues in Portfolio Companies
- Navigating SBIC-Independent Sponsor Deals
- Reps and Warranties
- Sourcing Strategies for the Lower Middle Market
- Tax Structuring in Dealmaking
- Technology/AI's impact on Investing
- Valuation Strategies
- More? Contribute your ideas!

ISF Insights: Contact us for pricing

ISF insights is a monthly E-mail newsletter that goes out to independent sponsors and to capital providers with a dedicated independent sponsor strategy.

Deliverable: Clickable ad/logo in each monthly newsletter.

- Circulation: 2,061
- Open Rates: 49%
- Click Rates: 35%

Please contact Ron Lippock at ron@sbia.org for more information and to discuss sponsorship of any of these opportunities.

Sponsorship Agreement Application

As part of the Sponsorship Agreement, you agree to provide primary and secondary contact names to the ISF. These individuals will be the sole points of contact with the ISF regarding sponsorship and are responsible for disseminating all information to the appropriate individuals at your firm, including, but not limited to networking lists, registration codes, hotel reservation information, deadlines for deliverables, and invoices.

Select the event you wish to sponsor:

- ☐ Dallas, TX
- ☐ Philadelphia, PA
- ☐ Chicago, IL
- ☐ Los Angeles, CA

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- ☐ Focused Educational Webinar (\$5,500)

Select the sponsor level requested:

- ☐ Patron Sponsor (\$16,500/event)
- ☐ Add-on 1 Boot Camp (\$5,500)
- ☐ Add-on 2 Boot Camps (\$11,000)
- ☐ Premier Sponsor (\$12,500/event)
- ☐ Contributing Sponsor (\$5,500/event)
(for capital providers only)

PRIMARY CONTACT INFORMATION

Contact Name: _____

Company Name: _____

Telephone #: _____ Email: _____

SECONDARY CONTACT INFORMATION

Contact Name: _____

Telephone #: _____ Email: _____

Authorized Signature: _____

Date: _____ Total: _____

Sponsorship fees are due via ACH within 30 days of receipt of invoice.

Please scan this page and email to Kris Korfonta at kris@sbia.org

- Please note the terms of sponsorships are non-negotiable, and all sponsorship payments are non-refundable.
- SBIA is not responsible for lost or missing sponsor materials.
- Covid-19 pandemic declarations have been lifted, however, in the event of any future material conditions that could make it unreasonable or impossible to go forward with a particular event, the ISF reserves the right at its sole discretion to amend the structure of any in-person event either to a hybrid or virtual format, or to cancel the event entirely, and modify sponsor benefits accordingly.

