

THE INDEPENDENT SPONSOR FORUM

2024 Sponsorship
Opportunities



WHAT IS THE ISF?

The **Independent Sponsor Forum (ISF)** is the only community developed uniquely **BY and FOR** independent sponsors and capital providers to create a high-quality, highly-vetted and efficient initiative that is able to meet the rapidly evolving needs of lower middle market investors.

Launched in partnership with the Small Business Investor Alliance (SBIA), the ISF Deal Series will be **invitation only** to a pre-screened list of capital providers and independent sponsors, ensuring each participant that their time will be well spent and yield the highest return. As exclusive, invitation-only events, **vendor involvement in these forums will be limited solely to ISF sponsors.**

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 by sponsoring one or more of the ISF Deal Series in 2024. **Each event will be limited to a maximum of five (5) Patron Sponsors.**

Overview of ISF Deal Series

- Efficient one-day events focused on 1:1 meetings between capital providers and independent sponsors with two (2) curated panel discussions on market challenges and/or opportunities
- Offered on a consistent basis, better matching the natural cadence of deal flow and open by invitation only
- Currently three Deal Series events are on the calendar for 2024:
 - Philadelphia on March 14
 - Nashville on May 14
 - Chicago on September 12

In addition to the Deal Series, the ISF will:

Build a peer community of Independent Sponsors for the candid exchange of best practices on critical investment strategies and challenges.

Offer insights and updates on key policy and regulatory issues with the potential to impact the Independent Sponsor ecosystem.

Help create a pool of prospective license applicants for the SBIC Accrual Debenture and SBIC Reinvestor ("fund of funds") strategies.

Meet the ISF National Steering Committee

The ISF's national steering committee is composed of independent sponsors and capital providers who provide high-level guidance and support vetted outreach to ensure every ISF event drives deep value.

Independent Sponsor Steering Committee



Alejandro Capetillo

Partner
Agile Growth Equity
[in](#)



Matthew Dakil

Vice President
Hemingway Capital
[in](#)



Max Dezara

Founder & Managing Partner
Akoya Capital
[in](#)



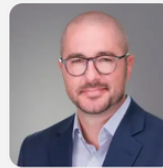
Chris Melton

Chairman & CEO
The White Oak Group
[in](#)



Franklin Staley

Managing Partner
Exeter Street Capital Partners
[in](#)



Josh Welk

Founder & Managing Partner
Full Guard Capital
[in](#)



Michael Zhong

Managing Director
3 Rivers Capital LLC
[in](#)

Capital Provider Steering Committee



Christian Albert

Managing Partner
Bowside Capital
[in](#)



Cameron Coley

Principal
Plexus Capital
[in](#)



Casey Hammontree

Partner
Resolute Capital
[in](#)



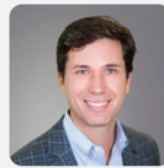
Brian Kerr

Partner
Prolign Capital
[in](#)



Tyson Smith

Partner
Tecum Capital Partners
[in](#)



William Timmerman

Managing Principal
Graham Capital Investments
[in](#)



Patrick Weston

Managing Partner
Route 2 Capital Partners
[in](#)



Lane Wiggers

Managing Director
Argosy Private Equity
[in](#)



Paul Witinski

Partner
Ironwood Capital
[in](#)



Stacey Wittelsberger

Partner
Patriot Capital
[in](#)

SPONSORSHIP OPPORTUNITY ^[1]

Patron Sponsor | \$15,000 per ISF Deal Series event

Exclusively for advisory firms, though not industry exclusive, this sponsorship level offers a deeply valuable opportunity to increase visibility, drive brand awareness, demonstrate expertise and expand your reach within the growing independent sponsor community. The Patron sponsorship offers the following benefits:

- Highly limited -- maximum of five (5) sponsors per event -- to ensure visibility in a target-rich environment.
- Participate in one of the two content sessions, both provided during meals to maximize 1:1 meeting opportunities. Content topics will be driven by community needs. ^[2]
- Opportunity to introduce yourself and your team to the market and demonstrate your expertise with a dedicated exhibit and meeting table.
- Receive custom invitations with your logo to invite clients and prospects (both subject to committee vetting) to this invitation only event. Collaborate with the committee to develop the target list for both independent sponsors and capital providers.
- Logo and brand visibility on all event-related channels including website, emails, and signage.
- Receive advance copy of attendance list to plan your business development approach.
- Two (2) registrations to the sponsored event.
- Contribute thought leadership pieces to ISF members and attendees.

Contributing Sponsor | \$5,000 per ISF Deal Series event

Exclusively for capital providers, with the following benefits:

- Receive custom invitations with your logo to invite clients and prospects (subject to committee vetting).
- Collaborate with the committee to develop the target list for both independent sponsors and capital providers.
- Logo and brand visibility on all event-related channels including website, emails, 1:1 meeting app, and signage.
- Receive advance copy of attendance list to plan your business development approach.
- One (1) registration to the sponsored event.
- Contribute thought leadership pieces to ISF members and attendees.

ISF Deal Series Sample Agenda

8:30am	Registration & Networking
9:00am	Breakfast with Panel
10:00am	Six (6) 1:1 Meetings
12:00pm	Lunch, Welcome and Panel
1:30pm	Nine (9) 1:1 Meetings
4:30pm	Networking Reception
5:30pm	Forum Concludes

[1] ISF may add additional regional forum sites in 2024 for sponsorship opportunity depending on demand.

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

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:

- ☐ March 14 (Philadelphia, PA)
- ☐ May 14 (Nashville, TN)
- ☐ September 12 (Chicago, IL)
(date pending confirmation)

Select the sponsor level requested:

- ☐ Patron Sponsor (\$15,000/event)
- ☐ Contributing Sponsor (\$5,000/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 Stephanie McAlaine at stephanie@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 the ISF may modify sponsor benefits accordingly.*