



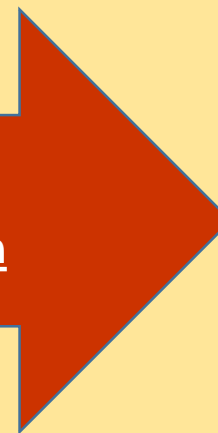
Oppenheimer's HQ



### Jim McCarthy Bullet-Point SkillSet in 6 Slides:

Summary: A savvy, highly-experienced co-founder with a deep-understanding of the FinServices Sector and the competitive landscape. This is a significant IP advantage/asset for the TEAM.

Currently Building a Highly-Reliable, Proprietary Distribution Capital Mkts Franchise



Apprentice

Producer

Sales Trainer

Leader/Manager

Coach & Mentor

Independent Money-Raiser





# Jim's Intellectual Property



- ***Trained by great Wall Street Firms in NYCity and trained ~150 brokers in both face-to-face and telephone (cold-calling) sales***
- ***Mentored/drilled by a legacy list of great salesmen, managers & general partners > it's not chance; it's executing simple goals***
- ***Experience – Drive – Street Smarts > THAT crowd-funding lacks***
- ***Proven money raising ability utilizing Insight, Innovation and Intelligence without the benefit of technology/web/social-media and I have the letters of commendation to confirm it.***
- ***Business development skills specific to startups & early-stage growth companies + HNW, Institutional and Corporate investors***
- **I have both executed and taught/managed “THE PROGRAM” of generating X qualified leads/day, X pitches/day and \$X new money raised/day from HNW folks AND sold multiple private placement units to individuals & institutions and entire \$10-20 million offerings to professional investors/money-managers/hedge-funds.**



I cut-my-teeth @ Oppenheimer & Company, LP:  
An Innovative Risk-Capital B/D, in the 1980s. Master  
Story-Tellers' Apprentice, became their peer. Does  
that make me a NYC Wall-Street Warrior or Dinosaur?



Jim at  
Startup  
Events  
&  
Meetups  
In NYC  
Tech-Hub  
Recently



So @ Oppenheimer's NYC HQ Office with Chicago  
and Los Angeles hooked in = A 300 Broker CROWD  
• Nate Gantcher & Mike Hayes Introduced the Team  
and Road Show Pitch to a sophisticated audience  
• WE each had 100+ HNW clients and/or prospects  
• T Bills @ 18%, high inflation, evil Russia looming BUT  
WE raised \$15-50M consistently in ANALOG AGE  
deal-after-deal-after-deal...



300 X 100 Qualified Leads =  
30,000+ CROWD (with no IT!)



B/D = Better Crowd-Funding  
Model > Crowd-of-Crowds  
Leverages the Activity by X

2018 DIGITAL AGE PLATFORM  
Utilizes Social Media + Smart  
WEB CustAcq, UserX, video  
and SaaS to grow a HUGE TRIBE



## **ENTREPRENEURIAL ACCOMPLISHMENTS (Partial List):**

**As a registered independent investment banker, raised \$10 million in a private placement for Streater Industries with ING Barings PE and \$17 million for Arena Pharmaceuticals with MPM Capital Management VC (both deals by myself).**



**Founding Partner with Flagstone Securities (a B/D startup), as Managing Director of the New/Emerging Companies Group. Our TEAM facilitated over \$500 million in private and public equity offerings for a diverse list of manufacturing, healthcare, technology, and financial services companies.**

### **PLEASE NOTE:**

**I have been an entrepreneurial, performance-paid professional as both an employee and self-employed contractor. I've hit a few home runs and had more than my share of adversities along the way. I know I've learned more from my failures than from my successes. Fortunately, I have been taught and mentored by a handful of the most talented people in Wall Street. The end game in business is all about making our customers the top priority.**

## SECURITIES & BROKER/DEALER INDUSTRY > Capital-Raising Skills:



Spent 12 years in NYC with Oppenheimer, Bear Stearns and Spencer Trask. Trained/mentored in “Opco model cities program” and the “Lehman Brothers cold-call model.” Helped Bear Stearns build its HNW account business and Private Placement Group. Outstanding success handling institutional accounts and wealthy individuals. Top ranking sales performance in public, private and venture capital financings with Fortune 500, emerging-growth and startup companies. Raised \$100+ million in managed money and participated in over \$2 Billion of private and public equity placements.

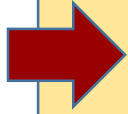
Letters of Commendation: (originals available with references)

**Oppenheimer**: “Congratulations on your performance during Opco’s heaviest private offering period ever. You rank number three on our all-time list for most private capital placed within 1 production month.”

**Bear Stearns**: “Your professionalism showed through in this deal. Your 9.5 units led the firm; your closest rival sold 4. I don’t think I have ever seen 9.5 units sold using only 11 books, congratulations! Talk about picking your targets carefully!”

**Spencer Trask**: “This letter is to commend your effort and work on the recent first closing for University On Line, Inc. The capital you have raised so far for this company entitles you to warrants plus the appropriate commission payout. Please keep going.”

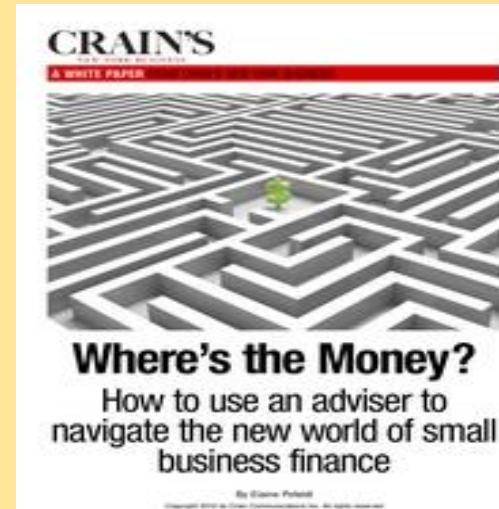
**TraXion**  
**Partners'**  
**Value-adds**



## Benefits of Professional Assistance with your Company's Capital Raise Project



- **Eliminate/mitigate a major, management distraction**
- Manage the corporate-finance campaign
- Deep network of all Capital-Sources/Crowds + how to access
- Identify investors: Economic (passive) and/or strategic
- Engage motivated, qualified investors (CROWD)
- Assembly line mentality: Leads - Pitches - Closes
- 3<sup>rd</sup> party endorsement plus objective due-diligence
- **SECURITIES LAW COMPLIANCE**



***A major challenge to raising risk-capital for a startup: CO's Ignorance of Task's Difficulty/Scope coupled with a "we know all that, not our first rodeo" overconfidence. **UNTIL THEY STEP INTO THE ARENA...*****



- Prepare (assist) essential marketing documents: email, two minute profile, executive summary, PowerPoint, prospectus if necessary
- Wall-Street-Speak & SELL the transaction = 3<sup>rd</sup> party endorsement
- Launch continuous focus on prospects, emails, phone calls, presentations, meetings and follow-up = Large DISTRIBUTION
- Advise on the structure/form and at negotiations if necessary
- Business development skills - Identify key people and facilitate relationships: Board of Directors, Advisory Board, VC Community, Strategic Partners
- Capital Market sponsorship and investor relations