



Private Investors' Successful Deals

Problem. Wealthy investors were frustrated with the historically low returns currently provided by stocks, bonds and money market investments.

Smart Solutions.

- Working with the investors' financial advisor, we performed due diligence that investigated potential early-stage investment and lending opportunities.
- We advised investors on essential aspects of the deal, including loan security, equity conversion, personal guaranties by the borrowing parties, and subordination of prior debt.
- We coordinated transactions with a financial advisor in New England, investors in California, businesses in Michigan, Montana, Colorado and Tennessee, and borrowers in Florida, California and Colorado.

Client Review.

"Barrie is a pro at assessing the issues, doing the due diligence, and providing the detailed information we all needed to make informed decisions on our investments." ...Gordon S., Keene, NH