

Lexington Capital Group, LLC

Firm Overview

Lexington Capital Group, LLC
853 West Randolph Street, Suite 200
Chicago, Illinois 60607
P (312) 226 - 4447
www.lexcagroup.com

Our Background

Lexington Capital Group, LLC is a leading independent investment banking firm that specializes in providing a full-range of financial advisory services to middle-market businesses. A highly active and experienced boutique, the professionals at Lexington have accumulatively raised and facilitated in their careers in excess of \$12 billion in private and public equity and debt and over \$10 billion in real estate and project financings. Their diverse backgrounds span finance, operations, real estate, legal and accounting and aggregate over 100 years of capital markets, commercial lending, corporate finance, real estate financings and management experience from well-known Institutional firms.

Our Services

The firm's service offerings include Public and Private Placements of Debt and Equity, Merger and Acquisition Advisory and Financial Restructuring Services. Whether it is a buy-side or sell-side assignment, recapitalization or corporate finance mandate, our clients come to us for:

- ◊ Institutional Placement of Equity Capital
- ◊ Senior, Mezzanine and Subordinated Debt Financing
- ◊ Mergers, Acquisitions and Divestitures
- ◊ Private Investment in Public Equity (PIPE's)
- ◊ Third, Fourth and Later-Stage Financing
- ◊ Financial Advisory Services
- ◊ Financial Restructurings

Our value-add lies in our creativity and our perspective, as seasoned bankers - to translate a company's business and financial needs - to the right investor audience.

Our Industry Focus

We bring exceptional depth and transactional experience across key industry sectors that span a wide variety of niche market segments; and various enabling technologies related to these sectors:

- ◊ Health Care
- ◊ Technology
- ◊ Communications
- ◊ Manufacturing
- ◊ Business Services
- ◊ Real Estate Sectors

In Real Estate alone, our dedicated professionals average over 20 years of experience in commercial real estate and have participated in the acquisition, project financing, asset management and disposition of more than \$10 billion of real estate transactions through several real estate cycles spanning over three decades.

Our Engagement Criteria

The firm's deep relationships with commercial lenders, the private equity community, institutional investors, and pension funds provide an array of funding sources for our clients. We build partnerships with well managed, established businesses which have a track record of producing strong consistent cash flow and earnings. We look to partner with companies who possess the following:

- ◊ Public or Private and Domestic or Global
- ◊ Revenues from \$50 to \$500 Million and more
- ◊ Trailing 12-month EBITDA of \$5 Million and up
- ◊ Institutional-Quality, Commercial Real Estate Properties



Our Engagement Style

We've built a firm that emphasizes personalized service, senior-level attention and seasoned execution of client transactions. We work with a limited and select client base and 'stress test' our assumptions as we pursue, in a balanced and focused way, engagement opportunities and assignments. This is because our (prospective) clients expect us to deliver the best advice, even if it means advising against a particular transaction. At the core, our reputation and our personal relationship with our clients is the single most important aspect of our business. We represent honest and forthright business people and we only want to partner with clients who will be comfortable with nothing less.

Beyond a company's balance sheet, we focus on the operating nuances of a business; and with disciplines in several key industry and transactional areas, our senior bankers are actively involved in every stage of a transaction – not just the beginning.

Our Transaction Scope

- ◊ \$10 to \$100M in Equity Capital Raises
- ◊ \$10 to \$500M in Debt Financings

Our Senior Professionals

Our professionals have accumulatively raised or facilitated in their careers in excess of \$15 billion in private & public equity and debt and over \$10 billion in real estate and project financings. Together, they aggregate over 100 years of capital market financings with institutions such as GE Capital, Morgan Stanley, Heller, First Boston, Fuji Bank, JPMorgan Chase, UBS, Finova Capital and have extensive expertise across the entire spectrum of traditional I-Banking activities.

