

John Doyle
Monday October 28, 2013

Show Feed

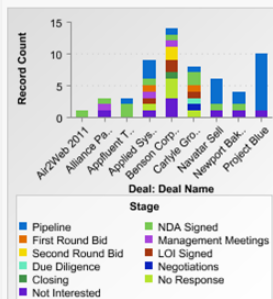
Dashboard

Refresh

Customize Page

As of 4/4/2013 10:03 AM. Displaying data as John Doyle.

Active Deals



Strategic Targets

Account Name	Record Count
Dickenson plc	6
Bain Capital	5
Grand Hotels & Resorts Ltd	5
Alliance Partners	4
Edge Communications	4
Burlington Textiles Corp of America	3
Carlyle Group	3
DeltaPoint Capital Management, LLC	3
United Oil & Gas, Singapore	3
Wall Street Capital	3

Client Wins

Deal: Deal Name	Record Count
Air2Web 2011	1
Applucent Technology Sell Side Deal 2010	1
Applied Systems Sell Side Deal 2010	1
Carlyle Group Buy Side Deal 2010	1
Newport Baking Sell	1

Deal Room Activity

Activity Alerts

Show: All Alerts

Range: All Time

Date	Firm	Contact Name	Deal	Document Name	Activity Type
03/01/2015	Edge Communications	John Smith	Project Blue	Project Blue Teaser.pdf	Document Downloaded
03/01/2015	Edge Communications	John Smith	Project Blue	Project Blue Teaser.pdf	Document Viewed
03/01/2015	Alliance Partners	Scott Horowitz	Vertica Systems - 2015	Alliance NDA Addendum.pdf	Document Uploaded
03/01/2015	Alliance Partners	Adam Lotelli	N/A	N/A	Contact Profile Updated
03/01/2015	Bain Capital	Janet Rispoli	N/A	N/A	Firm Profile Updated

Records: 1999+ [Show All](#)

Note: For Deal Room 1.3

Export

Note: On click of download .csv export of all the alerts as per view will be done with same alerts column via browser download.

Show dropdown options:
All Time
Today
Last 7 Days
Last 30 Days
Last 60 Days
Last 90 Days
Year To Date

Contact Profile Updated

Contact Name: Terry Grossman

Firm: Alliance Partners

Field	New Value
Contact Name	Terry Grossman
Phone	212-555-1223

Go to Contact Close

Firm Profile Updated

Firm: Alliance Partners

Field	New Value
Industries	Insurance; IT

Go to Firm Close

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Deal

Vertica Systems - 2012

Deal Contacts (2) | Targets (10+) | Open Activities (4) | Activity History (10+) | Notes & Attachments (0)

Deal Detail

EditDeleteCloneManage TargetsAdd/Invite TargetsEmail Targets

Information

Deal Name	Vertica Systems - 2012	Owner	John Doyle (Change)
Portal Deal Name	Textile Manufacturing Firm	Status	Interested
Account	Vertica Systems	Stage	CA Sent to Client
Source	Other	Reason for No Interest	
Active	✓		

Description

Deal Description The business was established in 1939. They specialize in manufacturing organic cotton yarn. This is a family managed business and has been profitable for several years. Two new manufacturing plants were opened in past 5 years, increasing the production capacity five times. The owners are looking to retire and exit from the business. Owners are looking for an exit

Deal Details

Deal Priority	Medium	Deal Team	Jim, Stewart
Record Type	Sell-side Deal (Change)	Potential Fees	\$5,000,000
Capital Raise		Deal Probability	70%
Next Step		Deal Size (in mn)	10 - 15
Evaluated Companies	14	Transaction Type	Buyout

Key Dates

Project Start Date	12/1/2012	Expected Date of Closure	3/31/2013
Project End Date		Project Execution Duration	

Deal Room

You have not been provided access to the Deal Room functionality by your Navatar Administrator.

Note : This message will appear when user has not been assigned licenses .

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Deal Icon

Deal

Vertica Systems - 2012

Deal Contacts (2) | Targets (10+) | Open Activities (4) | Activity History (19+) | Notes & Attachments (0)

Deal Detail

EditDeleteCloneView TargetsAdd/Invite Targets

Information

Deal Name	Vertica Systems - 2012	Owner	John Doyle (Change)
Portal Deal Name	Textile Manufacturing Firm	Status	Interested
Account	Vertica Systems	Stage	CA Sent to Client
Source	Other	Reason for No Interest	
Active	✓		

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Project End Date		Project Execution Duration	

Deal Room

Note :For Deal Room 1.3

You do not have access to this Deal Room. Please contact your Deal Room Administrator.

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Deal Room

Vertica Systems - 2012

Deal Contacts (2)Targets (13)Open Activities (4)Activity History (13)Notes & Attachments (0)

Deal Detail

EditDeleteCloneView TargetsAdd Invite Targets

▼ Information

Deal Name

Vertica Systems - 2012

Owner

John Dots (Change)

Portal Deal Name

Vertica Manufacturing Firm

Status

Interested

Account

Vertica Systems

Stage

CA Sent to Client

Source

Other

Reason for No Interest

Active

✓

▼ Description

Deal DescriptionThe business was established in 1939. They specialize in manufacturing organic cotton yarn. This is a family managed business and has been profitable for several years. Two new manufacturing plants were opened in past 5 years, increasing the production capacity five times. The owners are looking to retire and exit from the business. Owners are looking for an exit.

▼ Deal Details

Deal Priority

Medium

Deal Team

Jim, Stewart

Record Type

Self-side Deal (Change)

Potential Fees

\$5,000,000

Capital Raise

Deal Probability

70%

Next Step

Deal Size (in m)

10 - 15

Evaluated Companies

14

Transaction Type

Buyout

▼ Key Dates

Project Start Date

12/1/2012

Expected Date of Closure

3/31/2013

Project End Date

Project Execution Duration

▼ Deal Room

Vertica Systems - 2012 Deal Room info

Close Deal RoomClear Deal Room

Folders

Pending Files (Internal)

General Information (Global)

Legal Docs (Shared)

Target Account1

Corporate Information

1099s & W-2s

Articles of Organization

Business Licenses

Call Center Volume Data

Certificate of Good Standing

Corporate Officers

Domain List

Employee Manual

Employment Agreements

Facility Data

Facility Lease Agreement

Facility Pictures

Contents

Description: If you're an independent contractor, you get a 1099 form. If you're an employee, you receive a W-2. As a W-2 employee, payroll taxes...

Note For Deal Room 1.3. Description can be viewed by External Admins & Target sides in their Deal workspaces.

Document Name

Status

Statistics

Uploaded By

Firm

Uploaded On

C8-2013 W-2s.pdf

1

View

Mark Trump

Tequity

1/1/2015

C8-2012 1099s.pdf

1

View

Mark Trump

Tequity

2/1/2015

Notarized C8-2012-1099s.pdf

1

View

Bridget Carlin

CarLife Group

3/1/2015

Open

Update

Manage Versions

Delete

Alert History

Email Alerts To: 1

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Deal Room Info

Deal Room Name: Vertica Systems - 2012

Deal Room Contact: Mark Trump

Phone: 555-555-1111

E-mail: mtrump@tequity.com

Deal Room Description: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus. Vivamus elementum semper nisi. Aenean vulputate eleifend tellus. Aenean leo ligula, porttitor eu, consequat vitae, eleifend ac, enim. Aliquam lorem ante, dapibus in, viverra quis, feugiat a, tellus. Phasellus viverra nulla ut metus varius laoreet. Quisque rutrum. Aenean imperdiet. Etiam ultricies nisi vel augue. Curabitur ullamcorper...

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Deal Room Info

Deal Room Name: Vertica Systems - 2012

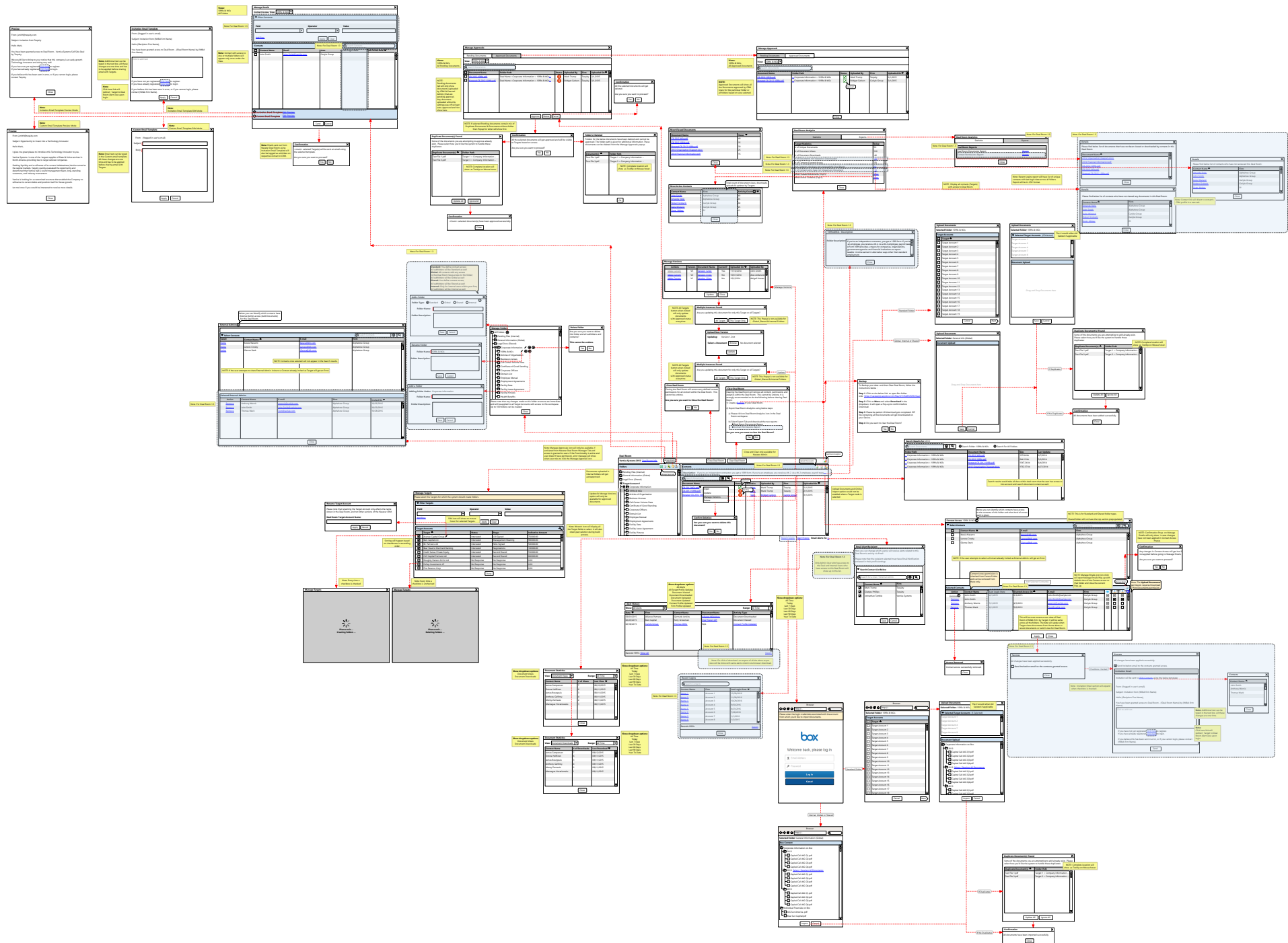
Deal Room Contact: Mark Trump

Phone: 555-555-1111

E-mail: mtrump@tequity.com

Deal Room Description: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus. Vivamus elementum semper nisi. Aenean vulputate eleifend tellus. Aenean leo ligula, porttitor eu, consequat vitae, eleifend ac, enim. Aliquam lorem ante, dapibus in, viverra quis, feugiat a, tellus. Phasellus viverra nulla ut metus varius laoreet. Quisque rutrum. Aenean imperdiet. Etiam ultricies nisi vel augue. Curabitur ullamcorper ultricies nisi. Nam eget dui.

SaveCancel



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Account Detail

EditDeleteSharingCheck InCapital IQ Basic InfoCapital IQ Entity Resolution

Account Information

Account NameAlliance PartnersView Hierarchy

SourceNew York Mar 2011 Event

Primary Coverage OfficerJohn DoyleChange

Phone98183666708

Account Status

Fax

Website

Parent Account

Description

Capital IQ CompanyId

Address Information

Billing Address

Washington

Shipping Address

Other Information

IndustryTechnology

Company Type

SIC Code

Geographic Region

Interested Buyer

ServicesLogistics

Interested Seller

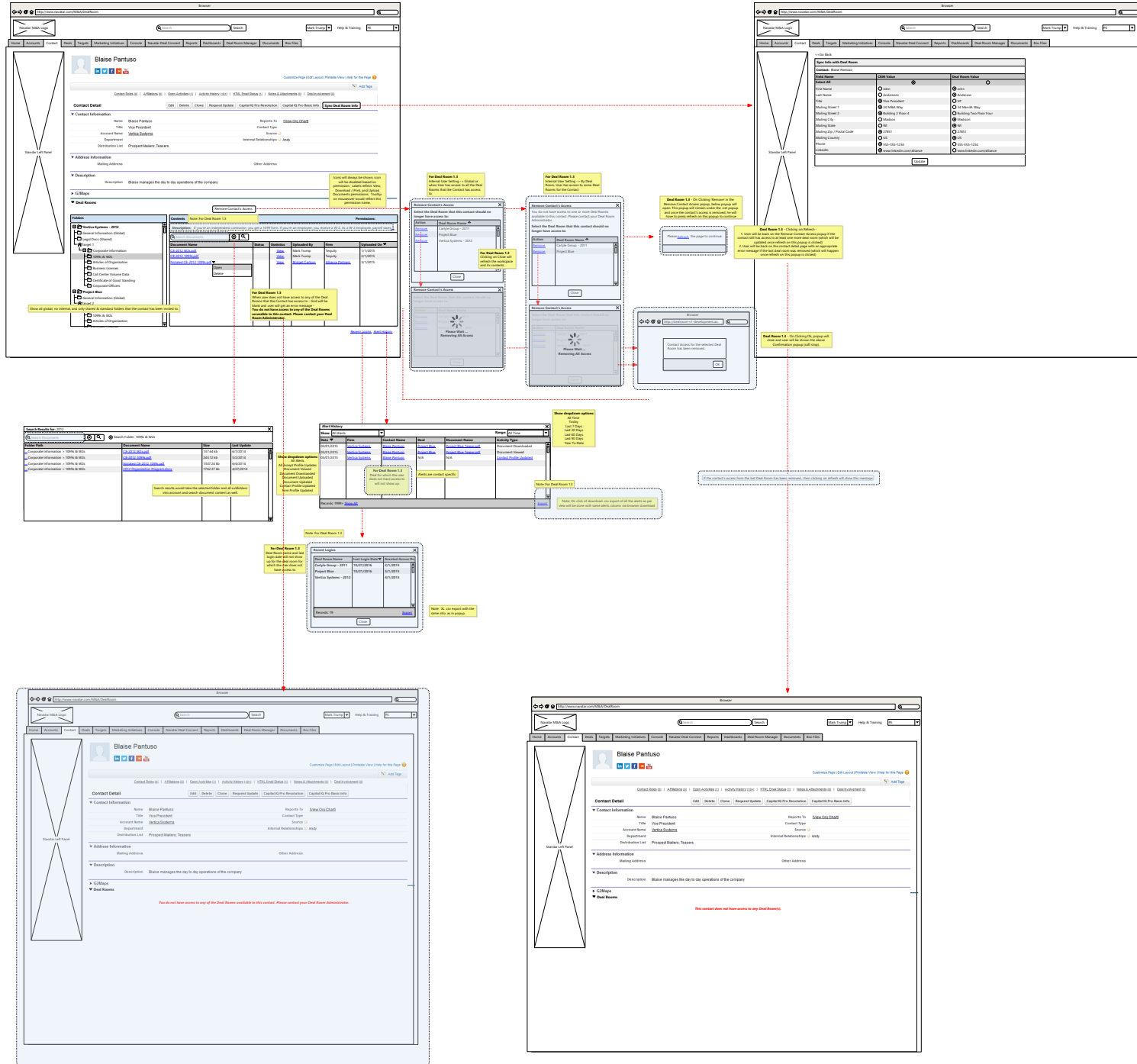
OwnershipPublic

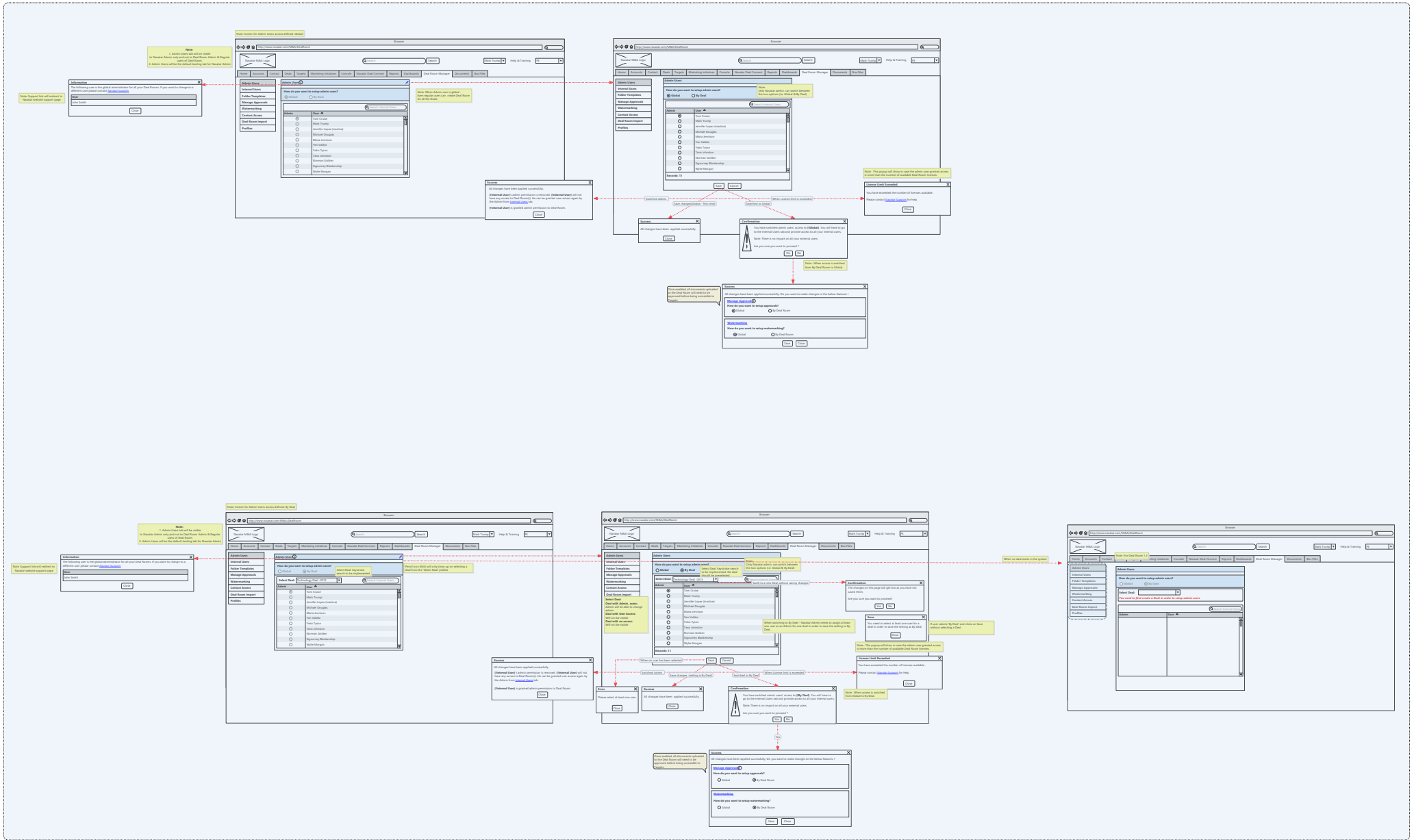
Deal Rooms

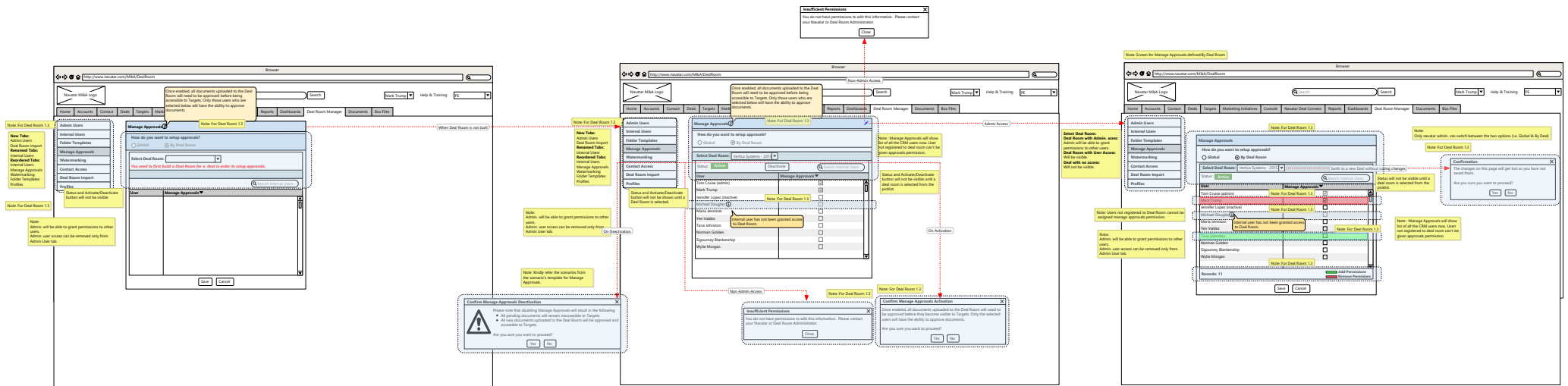
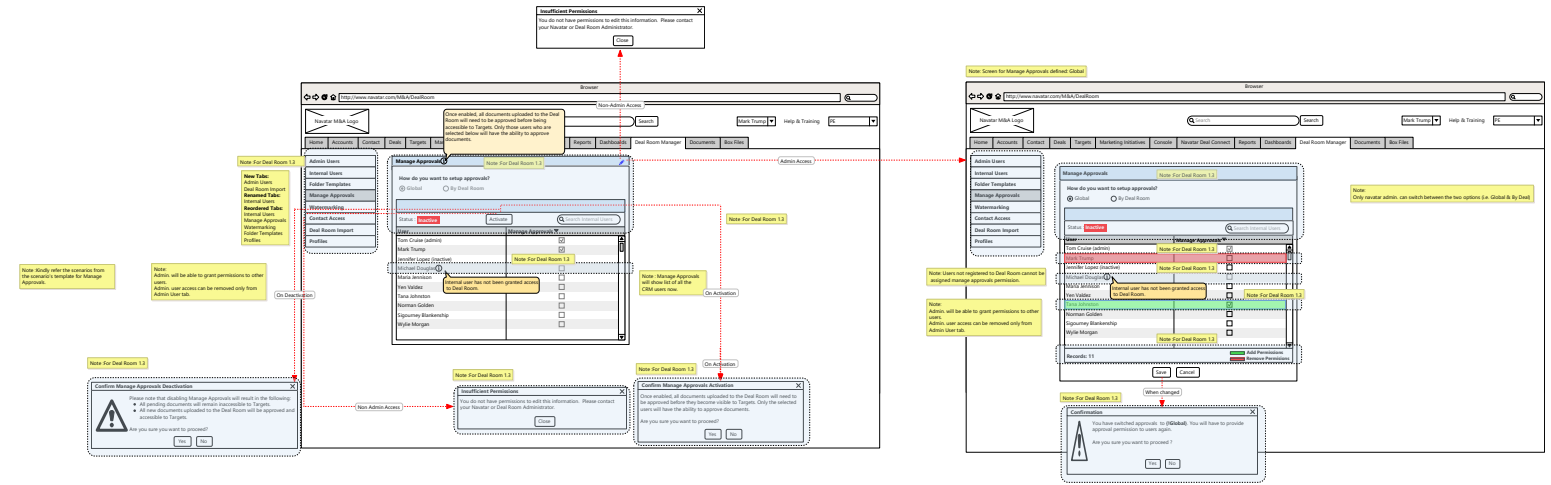
Deal Room Name	Deal	Deal Type
Air2Web 2014 Sell Side Deal	Air2Web 2014	Sell-side Deal
Applied Systems - 2013	Applied Systems Sell Side Deal 2013	Sell-side Deal
Carlyle Group Buy Side 2013	Carlyle Group Buy Side Deal 2013	Buy-side Deal
Newport Baking 2014	Newport Baking - Capital Raise 2014	Capital Raise
Vertica Systems Sell Side Deal	Vertica Systems - 2012	Sell-side Deal

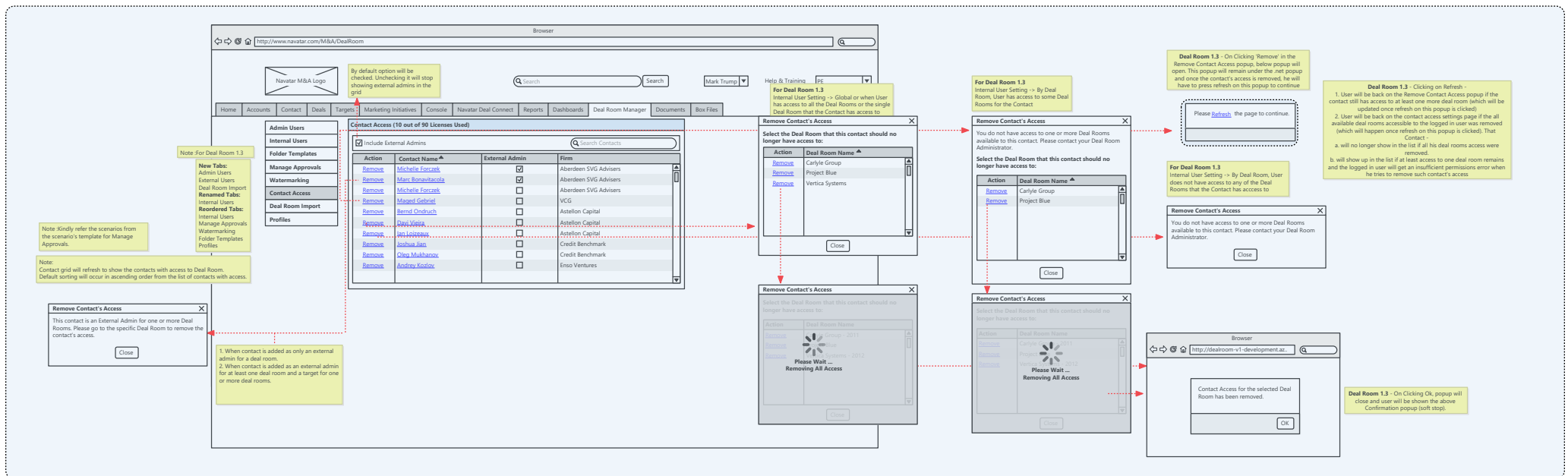
For Deal Room 1.3

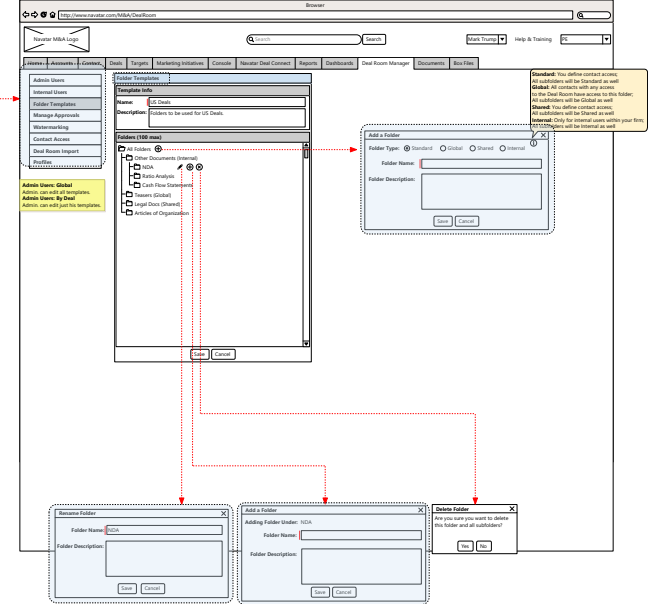
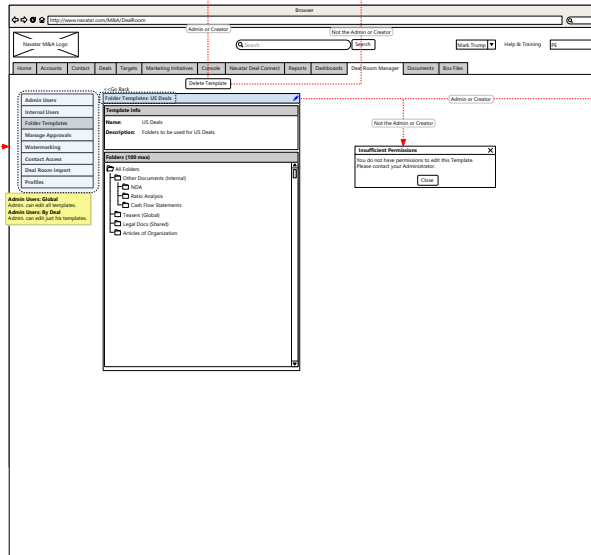
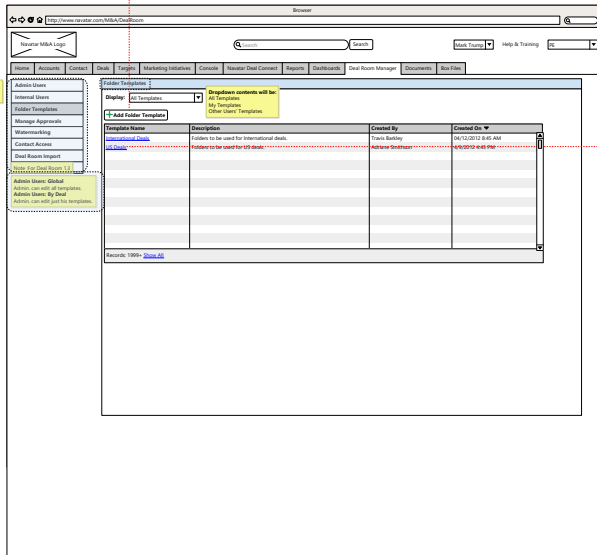
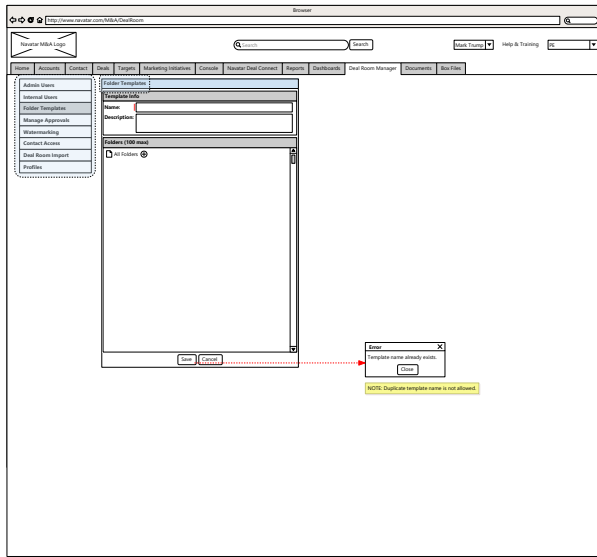
Only Deal Rooms that the user has access to will be shown. If the user does not have access to any of the deal rooms, the grid will be blank. Do not show any error message.

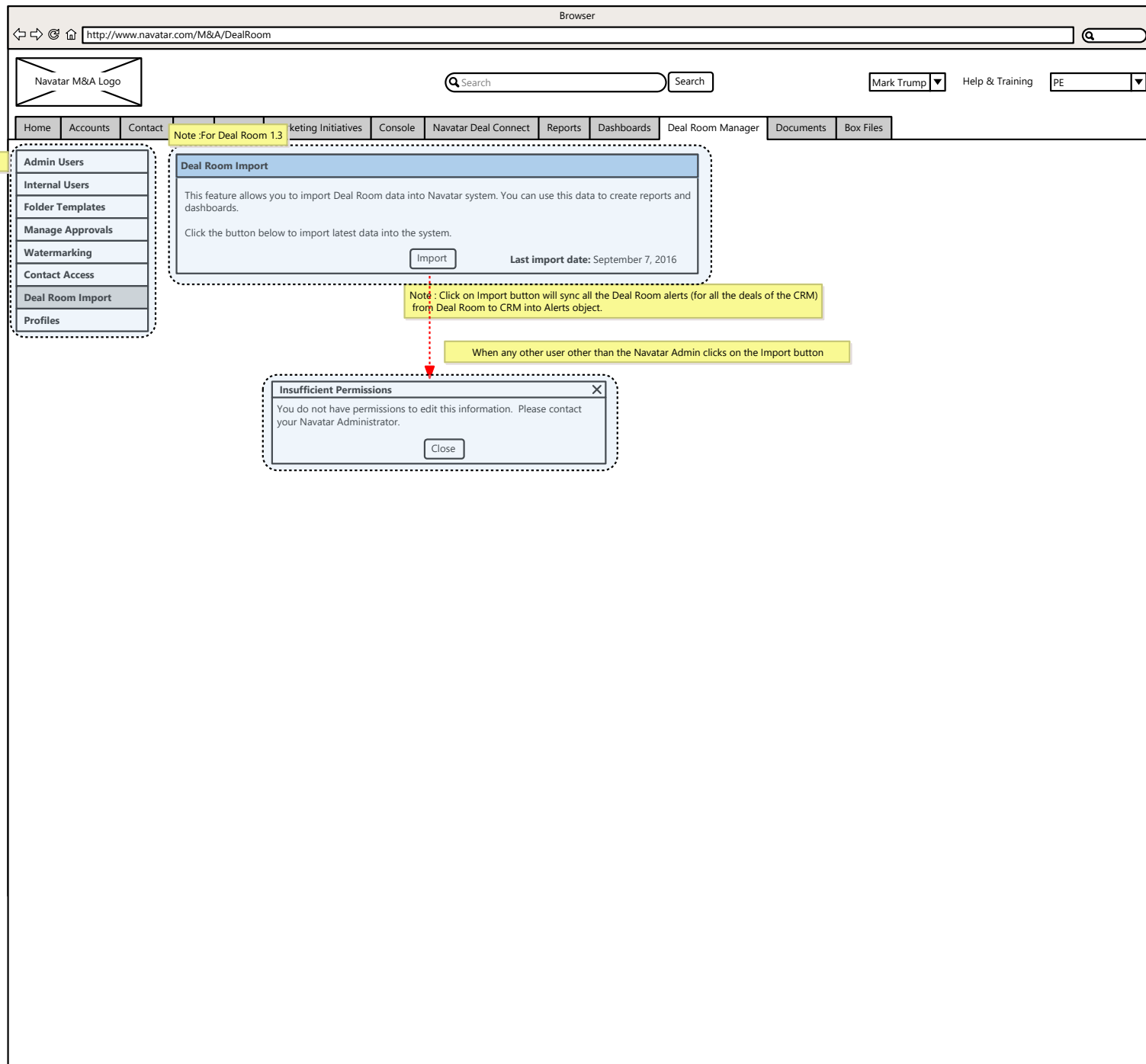












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Folder Templates

Manage Approvals

Watermarking

Contact Access

Deal Room Import

Profiles

My Profile

My Firm's Profile

Profiles

My Profile

Basic Information

Name: John Anderson

Phone: 555-555-1234

Title: Vice President

LinkedIn: www.linkedin.com/M&A

E-mail: info@aig.com

Address: 24 M&A Way

Building 2, Floor 4

Madison, WI 25871

Login Information

Username: JohnAnderson@M&A.com

Notification Preferences

How should you be notified of new activity?

☒ Daily Digest Email

☐ No Email

Note: For Deal Room 1.3

Note: For Deal Room 1.3

Browser

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Admin Users

Internal Users

Folder Templates

Manage Approvals

Watermarking

Contact Access

Deal Room Import

Profiles

My Profile

My Firm's Profile

Profiles

My Profile

Basic Information

First Name: John

Last Name: Anderson

Title: Vice President

Phone: 555-555-1234

E-mail: info@aig.com

LinkedIn: www.linkedin.com/aig

Mailing Street: 24 AIG Way

Building 2, Floor 4

Mailing City: Madison

Mailing State/Province: WI

Mailing ZIP/Postal Code: 25871

Mailing Country: USA

Login Information

Username: JohnAnderson@aig.com

Notification Preferences

How should you be notified of new activity?

☒ Daily Digest Email

☐ No Email

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To change your email address, please contact Navatar Support

Insufficient Permissions
You do not have permissions to edit this information. Please contact your Navatar or Deal Room Administrator.
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Note -For Deal Room 1.3

New Tabs:
Admin Users
Deal Room Import
Renamed Tabs:
Internal Users
Reordered Tabs:
Internal Users
Manage Approvals
Watermarking
Folder Templates
Profiles

Note: Kindly refer the scenarios from the scenario's template for Manage Approvals.

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Profiles

Firm Profile

Logo (300x55)

Header Background Color: ☐

Firm Name: Tequity

Public Login Link: <https://login.salesforce.com/dealroom/tequity>

Firm Contact: Mark Adamson

Phone: (555) 555-1111

E-mail: Mark.Adamson@Tequity.com

Website: <http://www.Tequity.com>

Address: 24 M&A Way
Building 2, Floor 4
Madison, WI 53871

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Tequity provides M&A advisory services to technology companies in the Software, Telecom, Internet, Hardware, and IT Services market in North America. We are experienced in both domestic and cross-border transactions, and regularly source strategic buyers for our clients from around the world. Mergers, acquisitions, carve-outs, and exits for technology companies are all we do. We don't raise capital or provide financing but are happy to make recommendations to firms that do.
As former tech company owners and executives, we understand the sacrifice and sweat equity

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Profiles

Firm Profile

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Public Login Link:

Firm Contact:

Phone:

E-mail:

Website:

Mailing Street:

Mailing City:

Mailing State/Province:

Mailing ZIP/Postal Code:

Mailing Country:

Description: **Tequity - M&A Advisors to Software & Tech Companies**
Tequity provides M&A advisory services to technology companies in the Software, Telecom, Internet, Hardware, and IT Services market in North America. We are experienced in both domestic and cross-border transactions, and regularly source strategic buyers for our clients from around the world. Mergers, acquisitions, carve-outs, and exits for technology companies are all we do. We don't raise capital or provide financing but are happy to make recommendations to firms that do.
As former tech company owners and executives, we understand the sacrifice and sweat equity that has gone into building your company. When it's time to sell, it's crucial to work with an advisory firm that knows and understands how to value intangible assets, who the players in your industry are, and how to attract multiple, qualified buyers to your opportunity.
Why Software & Technology Companies Choose Tequity
With many years' experience as executives, consultants, and owners of software and telecom companies, Kevin Tribe and his team assist CEO's and shareholders with divestitures, acquisitions, valuations, and exit strategies.

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