

April 16th, 2025

Deliverables for Capital Advisory Consultancy Services For Equity Sale Engagement

Objective:

To deliver end-to-end capital advisory services supporting the equity sale of the client's business, including valuation, investor outreach, marketing, deal structuring, and transaction closure.

1. Preparation of Marketing Collaterals

We will create comprehensive and high-quality marketing materials that effectively communicate the value proposition of the client. This includes an **interactive website** that visually represents the company's vision, product portfolio, IP assets, and leadership. The website will integrate **graphical elements and embedded videos**, include **client testimonials**, and provide downloadable brochures and whitepapers. The design will reflect professionalism and innovation to appeal to investors, partners, and media.

2. Video Coverage of Products and Client Interviews

Our creative team will produce a compelling **video series** showcasing the client's products, technology, and user experience. These videos will include **client interviews, use-case demonstrations, and behind-the-scenes views** of product development and operations. The goal is to build trust and emotional engagement with potential investors by showing real-world value and client satisfaction. Videos will be professionally scripted, shot, and edited to meet global corporate standards.

3. Social Media Blast and Engagement Campaign

We will execute a targeted **social media strategy** designed to increase visibility and generate buzz about the equity opportunity. Campaigns will be run across LinkedIn, Twitter, YouTube, and industry-specific forums, using custom content, strategic hashtags, and paid reach. The campaign will aim to **boost interactions**, grow followers, and funnel traffic toward the interactive website and pitch materials. We will track engagement metrics and optimize accordingly.

4. IP Valuation from Credible Organisation

We will coordinate with a reputable, **globally recognized intellectual property valuation firm** to assess and quantify the commercial value of the client's proprietary technologies, patents, and trademarks. The valuation report will be compliant with international IP valuation standards and will support premium investor positioning. This will form a critical part of the business's intangible asset value and help attract strategic buyers.

Cleaffer Capital Management, LLC FZ

Meydan Grandstand, 6th Floor,
Nad Al Sheba, Dubai, UAE
+971 58 993 9227, info@cleaffer.com
www.cleaffer.com

5. Financial Restructuring and Modelling

Our financial experts will conduct a full review of the client's current capital structure and provide recommendations for **restructuring debt and equity**, optimizing tax strategies, and aligning with investor expectations. We will also develop detailed **financial models**, including scenario analysis, cash flow forecasts, and return metrics, providing transparency and insights for investors.

6. Business Plan Modelling

We will build a comprehensive **5-year business plan model**, including market assumptions, revenue streams, cost structures, and expansion strategies. The plan will be dynamic and investor-ready, allowing scenario testing and benchmarking. It will integrate insights from industry trends and highlight how capital infusion will be deployed to drive growth and returns.

7. Company Valuation from Credible Organisation

A thorough company valuation will be conducted in partnership with a **recognized valuation advisory firm**, using multiple methodologies such as DCF, comparable, and precedent transactions. This ensures the valuation withstands investor scrutiny and is supported by robust documentation. It forms the basis for negotiations and sets expectations for fundraising or exit scenarios.

8. Preparation of Comprehensive Pitch Deck

We will design a **visually compelling and analytically strong pitch deck**, customized for investor presentations. The deck will cover all key areas including market opportunity, business model, financials, competitive landscape, team, IP, and use of proceeds. It will be suitable for both live presentations and digital sharing, with narrative flow designed to persuade and engage.

9. Investor Search

Using our network of VC firms, PE funds, family offices, and strategic investors, we will compile a **target list of qualified investors** that align with the client's industry, stage, and geography. We will initiate contact, share materials, and gauge interest. The objective is to attract a pool of competitive and well-suited investors to maximize valuation and fit.

10. Interaction and Presentation with Potential Investors

We will organize and lead investor presentations, ensuring that each session is tailored to the specific interests of the investor. This includes **preparing client leadership**, coordinating **follow-up communications**, and managing due diligence requests. We act as the lead advisor during all touchpoints to ensure messaging consistency and professional delivery.

11. Physical Engagement and Road Shows with Potential Investors

For high-potential investors, we will coordinate **in-person meetings, site visits, and roadshows** in key financial centers or investor hubs. These engagements allow investors to build trust, experience the product firsthand, and ask detailed questions.

We manage logistics, presentation materials, and briefing notes to ensure a smooth and impactful experience.

12. Negotiation with Shortlisted Investors

We will lead and support the negotiation process with shortlisted investors, including valuation discussions, investment terms, governance structures, and post-deal roles. Our team ensures that the client's interests are represented and that all terms are commercially and legally sound. We help navigate competitive offers to optimize outcomes.

13. Term Sheet Sign-Off

We facilitate the drafting, review, and finalization of the **Term Sheet**, working alongside legal counsel and ensuring all key terms—valuation, dilution, rights, exit provisions—are clearly defined and favorable. We conduct detailed comparisons of competing offers (if any) and advise on the strategic implications of each clause.

14. Closure and Transfer of Funds

We assist in managing all steps toward transaction closure, including due diligence support, documentation, regulatory filings, and final transfer of funds. We work closely with all stakeholders—legal, financial, and banking teams—to ensure a smooth and timely **deal closure**. Post-closing, we provide reporting support and help manage investor onboarding.

We appreciate your prompt response and look forward to exploring a potential collaboration with your esteemed company.

Warm regards,



Sanjeev Maini

Partner

UAE: +971 58 993 9227 (WhatsApp + Botim)

INDIA: +91 997 123 2959

EMAIL: sm@cleaofferserv.com