

1) On the Front Cover

Imperial Capital, LLC.
The Investment Think Tank

2) Opening Page

Header: **The Formula for Success**

Copy:

What is a Think Tank?

A **think tank** is a group of individuals dedicated to high-level synergistic research and solutions on a variety of subjects. Think tanks support intensive research, analysis, creative thinking, and problem solving focused on creating innovative solutions.

What is Imperial Capital?

1. An investment think tank comprised of a high-level group of financial and business experts committed to intensive research, deep analysis, creative thinking, innovative problem-solving and integrity, focused on developing unique solutions to insure your financial success.

2. A dynamic investment banking firm offering quality financial services to High Net Worth Individuals, Companies and Institutional Investors. A company specializing in:

- Corporate Finance: Private Placements, Capital Raising, Mergers & Acquisitions, Restructuring & Advisory Services, Valuations & Fairness Opinions
- Institutional Sales & Trading: High-Yield and Distressed Corporate Bonds, Convertible Securities, Institutional Equities, Preferred Stocks, Bank Debt, Bankruptcy Analysis Team, Capital Structure Arbitrage; Research - Expert Analysis, Daily Market Update, Focus List, Busted Convert Monitor, In-Depth Research Reports

3. **Your Formula for Success**

2) Corporate Overview Section

Header: Corporate Overview: The Powerhouse of Investment Knowledge

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Ever wish you had an extra brain that could solve all of your problems?

Well, Imperial Capital, LLC is a powerhouse of institutional securities, investment banking and corporate restructuring knowledge with over 35 brains just waiting to create superior solutions for all of your investment banking needs. The firm is built on a strong foundation of forward thinking Wall Street veterans. Our extraordinary team is comprised of former bankruptcy and restructuring attorneys; seasoned research, sales, and trading professionals; and talented investment banking specialists, who have the keen ability to craft winning strategies that produce results beyond expectation.

Header: In the Tank, Out of the Box

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In today's climate of global change, relentless competition, growing complexity and shifting economics, **2+2** can't afford to equal **4**. Insuring financial and corporate success means **2+2 must** equal **5** or **more!** To achieve sound stability and continued growth in the midst of constant change takes an investment partner with rare abilities and a unique approach to solving problems. Imperial Capital, LLC is a leading full service boutique investment firm that combines vertical AND horizontal thinking strategies to create innovative investment solution. We don't just look through the eyes of standard practices, but instead stretch beyond traditional investment parameters. We delve into every angle of the situation and design solutions based on creative problem solving methods that blend tried-and-true solutions with truly novel ideas. This combination of "In the Tank, Out of the Box" thinking gives us an impressive arsenal of quality services to insure our clients' success.

THINK VERTICAL

Vertical solutions are based on existing ideas or knowledge -- solutions that have a proven track record.

- In-Depth Research
- State-of-the-Art Analytics
- Mining the best existing opportunities
- Utilizing the strongest traditional solutions
- Uncovering hidden opportunities

THINK HORIZONTAL

Horizontal solutions are based on thinking in totally new directions.

- Creative collaborative team brainstorming
- Generating multiple options
- Breaking the rules
- Using a high level of strategic awareness

- Creating uniquely targeted solutions based on combined vertical and horizontal strategies.

[This last one should sit in the middle underneath both columns.]

Header: The Financial Brain Trust - Who we are

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Imperial Capital, LLC is a full service institutional securities brokerage and investment banking firm with offices in Beverly Hills, New York and Whitefish, Montana. Building solid financial futures takes an organization designed to respond quickly to continuous stimulus from the market place. It demands fast assimilation of new data, deep knowledge of structure, flexibility, agility and creativity to insure sound investment and business solutions for growth. Imperial Capital is comprised of a cross-functional handpicked team of top professionals that works in unison to design innovative and robust solutions that turn obstacles into opportunities.

[List just principles and corporate management team names here. Client to provide current info.]

3) Services Section

Header: The Think-and-Do-Tank: Imperial Capital's Advantage

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More than just being a Think Tank, Imperial Capital is a "Think-and-Do-Tank". Our firm, owned by the senior staff members, takes an innovative collaborative approach to satisfying our clients' needs. We offer the distinct advantages of a large firm with state-of-the-art analytics and comprehensive services, yet the flexibility of a boutique firm known for its break-through ideas, inventive solutions and the highest ethical standards of client service. Our services are structured not just to apply existing models, but to combine them to create new and more powerful models. Imperial Capital provides a broad array of products and services with an expert team of seasoned professionals in each sector.

Header: Corporate Finance

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Imperial Capital's Corporate Finance department offers an exceptional array of Products and Services that are custom tailored to meet the unique needs of our clients. Our Corporate division draws on the placement capabilities of more than 20 institutional traders and salesmen, and the specialized expertise of our Research Group. We have gained strong recognition for our specialties in the healthcare, financial institutions, energy, consumer products, restaurants, technology and telecommunications industries.

Corporate Finance Services:

- Private Placements
- Mergers & Acquisitions
- Valuations & Fairness Opinions
- Capital Raising
- Restructuring & Advisory Services

Header: Institutional Sales and Trading

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Imperial Capital’s Sales & Trading Group is dedicated to providing our institutional clients with superior service and execution in the markets for bank loan, high yield, convertible, and preferred and common equity securities.

To this end, we have assembled an experienced team of over 25 seasoned market professionals in our New York and Los Angeles offices.

Sales & Trading Services:

- High-Yield/Distressed Corporate Bonds
- Institutional Equities
- Bank Debt
- Capital Structure Arbitrage
- Convertible Securities
- Preferred Stocks
- Bankruptcy Analysis Team

Header: Analytical Dexterity at Work

This section will include a short description of the extensive research process that goes into creating each uniquely targeted client solution.

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Too much of what passes as economic analysis is just building a case for the status quo. Imperial Capital’s dexterous analytical team digs deeper to get beyond just telling you what you want to hear. We look at the whole picture and plot a course for the future according to extensive analytical data.

The Imperial Capital Research Group is the backbone that gives our “Think-and-Do-Tank” the foundation for designing well-honed investment solution. Our team is comprised of experienced analysts from diverse backgrounds--including high yield research, commercial banking, high yield investment management, bankruptcy law, and equity research. These analysts collectively apply their experience and judgment to provide a multi-faceted perspective on every situation. As well as supplying extensive information to the firm’s finance experts,

the Research Group also provides clients with valuable, targeted in-depth research reports to aid them in attaining superior investment performance.

Research Services:

- Highly Expert Analytical Advisors
- Daily Market Update
- Bank Debt Notes - Summaries of Opportunity
- Bank Debt Notes - Summaries of Opportunity
- Busted Convert Monitor - A monthly publication that surveys the universe of busted convertible bonds, highlighting trends and Imperial Capital's recommended investments.
- Focus List
- Preferred Stocks
- In-Depth Research Reports
- Bankruptcy Trading Notes - Summaries of specific bankruptcy/workout situations
- Desk Trading Notes - Summaries that focus on opportunities presented by news or other events that cause increased price volatility.

4) Corporate Team/ Bios Section

Header:

The Think Tank Experts [Alt: Meet the Experts]

[Need list of full team from client]

Corporate Finance Team

- * Jason W. Reese
- * Christopher Shepard
- * Allen H. Stern
- * John H. McNamara Jr.
- * Thomas T. Thompson
- * Eric White
- * Kristen Engle
- * Nicole Fry

Analyst Team

- * Andrew Cray
- * Joseph J. Farricielli, Jr.
- * Mary Ross Gilbert, CFA
- * Melissa Henderson
- * Robert G. Konefal
- * Randy Laufman
- * Mark Levin
- * Stephen G. Moyer, CFA
- * Christopher A. Provost
- * Charles M. Ronson
- * Kevin Starke, CFA
- * Ryan Whitesell