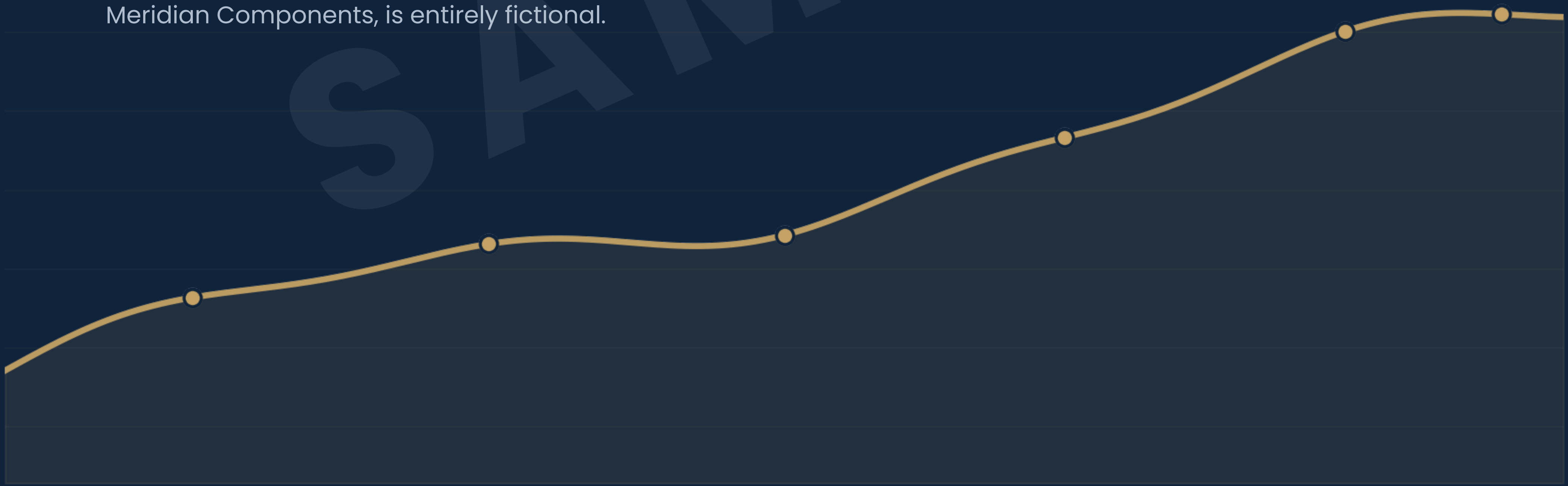
CUSTOM DOCUMENT SERVICES

Document Samples

Anonymized excerpts from the done-for-you documents we build for buyers and sellers, including Confidential Information Memorandums, investor decks, and lender packages. Each is built from scratch from your business and your deal. The company shown here, Meridian Components, is entirely fictional.



COMPANY OVERVIEW

Meridian Components, LLC

Meridian Components is a precision CNC machining and contract manufacturing business serving the aerospace, medical device, and industrial equipment markets. Founded in 2004, the company operates from a modern 38,000 square foot facility and has built long-tenured relationships with a diversified base of blue-chip OEM customers. The business runs on a complete management team, with the founder prepared to transition to an advisory role at close.

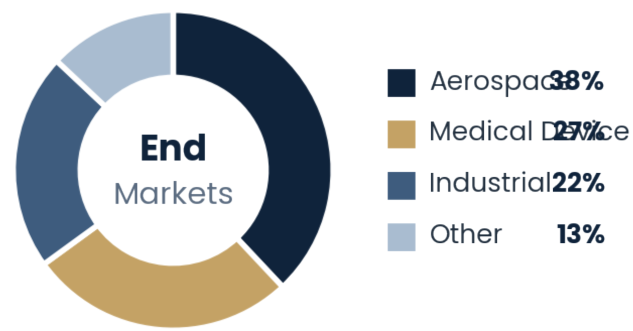
FY25 REVENUE
$14.2M
14% three-year CAGR

ADJ. EBITDA
$3.1M
21.8% margin

EMPLOYEES
68
Across two shifts

ACTIVE CUSTOMERS
120+
No customer > 11%

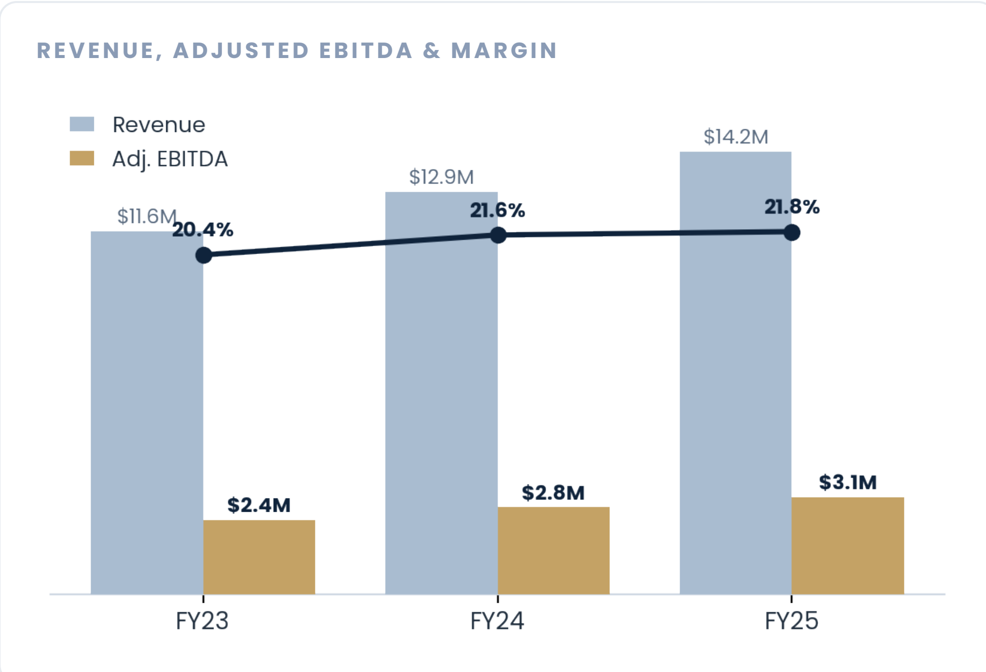
REVENUE BY END MARKET



Founded 2004 · **HQ** Midwest U.S. · **Facility** 38,000 sq ft · **Certifications** AS9100, ISO 13485

FINANCIAL PERFORMANCE

Consistent Growth, Expanding Margins

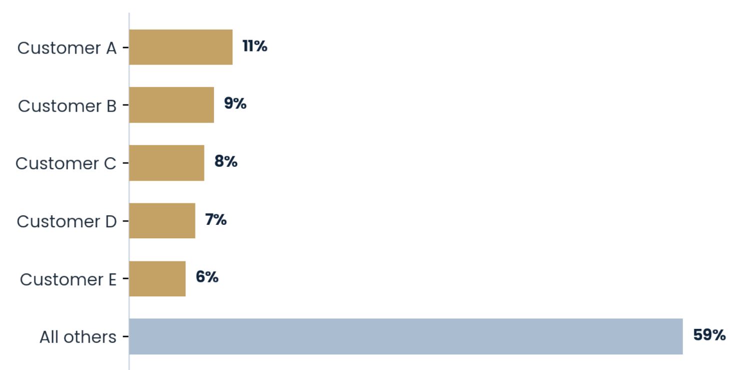


Normalized results reflect add-backs for above-market owner compensation, one-time facility costs, and non-recurring legal expense. Adjusted EBITDA has compounded at 14% on operating leverage and disciplined pricing.

$000S	FY23	FY24	FY25
Revenue	11,640	12,910	14,200
Gross Profit	4,190	4,770	5,390
Adj. EBITDA	**2,380**	**2,790**	**3,100**
Margin	20.4%	21.6%	21.8%

CUSTOMERS & INVESTMENT HIGHLIGHTS

A Diversified, Defensible Franchise



No single customer exceeds 11% of revenue and the top five account for 41%. Average customer tenure exceeds eight years.

Durable, expanding margins
Tight tolerances, qualified processes, and high switching costs protect pricing.

Diversified end markets
Aerospace, medical, and industrial demand smooths any single-sector cycle.

Complete management team
The business runs without the owner, who will support a structured transition.

Embedded growth pipeline
Qualified new programs and recent capacity investment support continued double-digit growth.

THE OPPORTUNITY

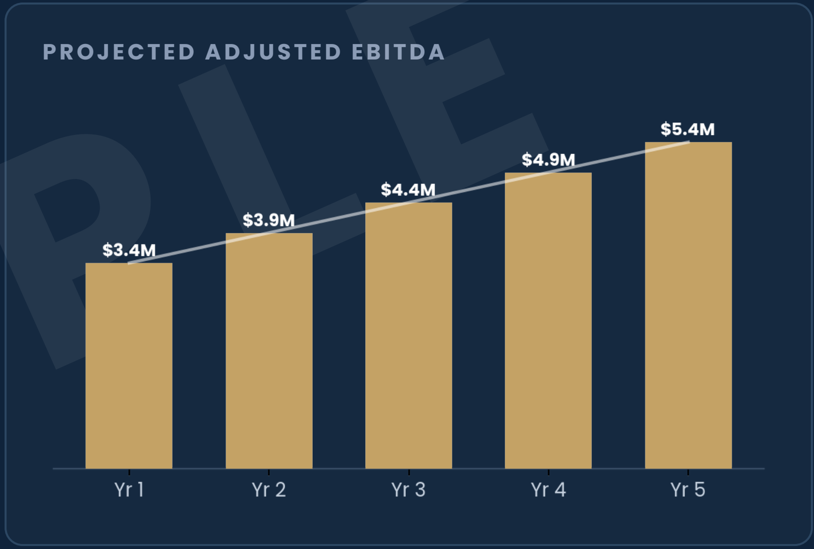
Acquire a Cash-Generative Manufacturer

We are raising equity alongside SBA-backed debt to acquire Meridian Components, a profitable, founder-built precision manufacturer, and fund a two-year capacity and commercial expansion plan.

Proven cash flow
$3.1M of adjusted EBITDA at a 21.8% margin, growing double digits.

Clear value-creation plan
Add a third shift, expand the OEM base, and professionalize operations.

Downside protection
Diversified customers, real assets, and a seller note aligned to performance.



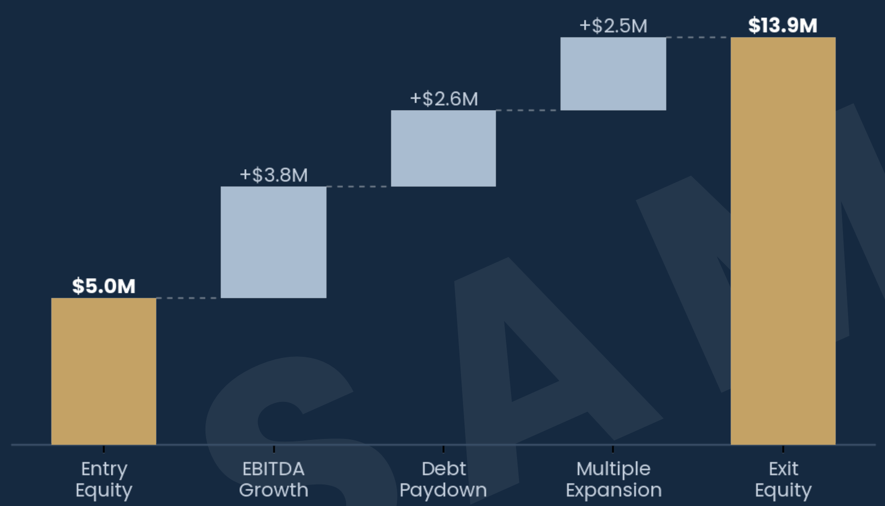
ENTERPRISE VALUE
$18.5M

EQUITY SOUGHT
$5.0M

RETURNS & VALUE CREATION

How Equity Value Compounds

VALUE CREATION BRIDGE — EQUITY ($M)



Returns are driven by EBITDA growth, disciplined debt paydown, and modest multiple expansion at exit, not financial engineering. A five-year hold targets a 2.8x base-case return.

ENTRY MULTIPLE
6.0x

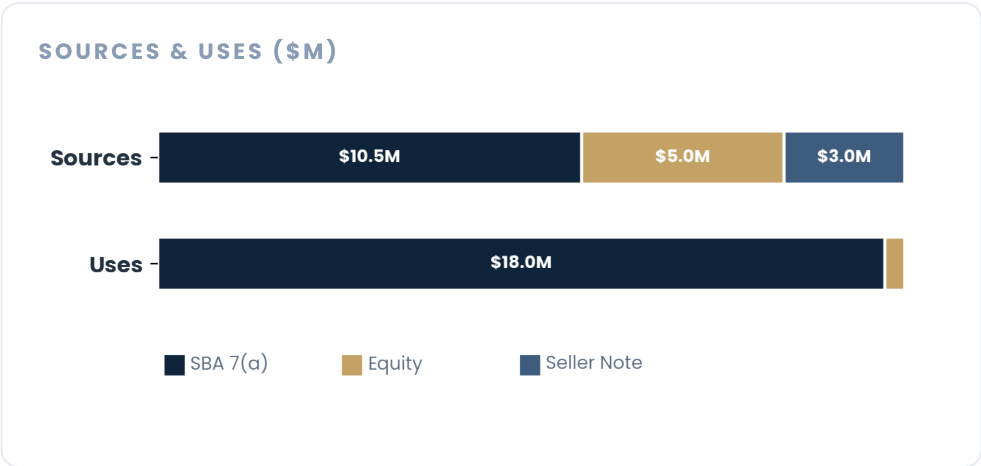
HOLD PERIOD
5 yrs

BASE MOIC
2.8x

BASE GROSS IRR
28%+

FINANCING STRUCTURE

A Well-Capitalized Request



The borrower funds the acquisition with a meaningful equity injection and a seller note on standby, producing coverage comfortably above program guidelines.

SBA 7(A) LOAN

$10.5M

10-year term, prime + spread

EQUITY INJECTION

27%

Above the 10% minimum

COLLATERAL COVERAGE

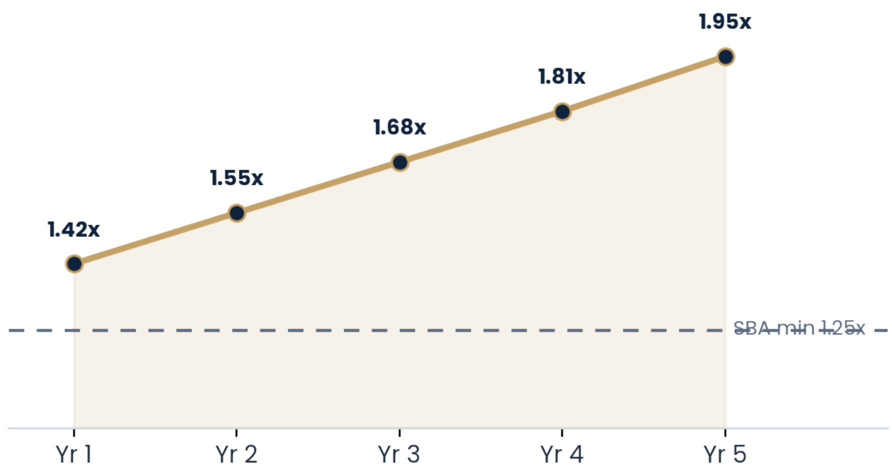
1.1x

Real estate, equipment & goodwill

DEBT SERVICE COVERAGE

Coverage With Room to Spare

PROJECTED DSCR VS. SBA MINIMUM



Debt service coverage opens at 1.42x in Year 1, more than 15% above the SBA minimum of 1.25x, and strengthens each year as the business grows and the loan amortizes.

YEAR 1 DSCR

1.42x

vs. 1.25x program minimum

FIVE-YEAR AVERAGE

1.68x

Improving each year

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