

Certified Courses



Venture Capital, Angel Investors, Hedge Funds, and Private Equity

INTRODUCTION

- This training seminar focuses on understanding the comprehensive range of alternatives for both debt and equity offered by capital providers worldwide. The program reviews the composition of assets [funds] managed by venture capital [VC] firms, individual and pooled angel investors, hedge funds, and private equity firms. It will examine case examples for each of the four providers relative to internal investment policies, financial positioning, expected time horizons, risk assessment and management, as well as the types of ventures [start-up and emerging growth], larger companies, and selection criteria for product-service projects they invest in. This seminar will also review several global networks for proactive deal-flow and screening-evaluation process flow and referrals, including a wide range of firms, funds, and individual investors from Silicon Valley to SE-Asia, Europe, and crowd-funding consortia.

This training seminar will highlight:

- The roles these four entities play in the global economy and investment infrastructure
- All types of Venture Capital [VC] firms and their typical investment target-profiles
- All types of angel investors and networks, and their typical investment target-profiles
- All types of hedge funds and their typical investment positions / target profiles
- All types of private equity firms and their typical investment positions / target profiles
- The role these four capital providers play in global enterprise development and growth
- The investment criteria, risk positions, and time-horizons required to approach such firms / funds
- Strategies for engaging such firms / funds and securing various types of capital provisions

OBJECTIVES

- Review the asset portfolio mix of a typical VC firm, hedge fund, or private equity firm
- Analyze the risk positions and screening protocols for capital providers
- Differentiate the key targeted investment opportunities for these four entities
- Explain the primary financial intermediary roles these entities serve in the global economy
- Develop a review and analysis profile for any of these four capital providers
- Evaluate the pros and cons of early stage individual [angel] investors vs. VCs or private equity
- Produce an executive summary profile for a contemporary VC firm, hedge fund, private equity firm, and/or angel network-association
- Select the best potential matches of these providers for companies, ventures, projects, or product-service development related to your own company and industry

TRAINING METHODOLOGY

- This training seminar will use an inductive reasoning approach for introducing new terms-concepts-models-methods, followed with highly interactive case-discussion aimed at practical application. Small-group team case projects will apply capital provider concepts directly to the attendees' firms / organizations / industries. The main focus is about being proactive in developing a strong understanding of capital providers that could provide strategic, value-added support for a wide range of potential future investment opportunities.

ORGANISATIONAL IMPACT

Attendees will have immediate return-on-investment [ROI] to their own firms / organizations by bringing models, concepts, terminology, perspectives, and capital provider network approaches directly to their workplace, colleagues, staff, and senior management. The ROI is that attendees will be ready to demonstrate these tangible skills and competencies:

- A strong understanding of VCs, hedge funds, private equity, and individual angel investors
- Creating selection criteria for approaching various capital providers relative to opportunities
- Being proactive in assessing risk positions and time-horizons for different capital providers
- Being proactive in building investment portfolio selection criteria for new projects
- Readily understand different focus – industry – risk – timing profiles for new investments
- Be the point-person to establish dialogue-rapport with different capital providers

PERSONAL IMPACT

Attendees will further their own professional development by:

- Understanding key nuances, differences, and similarities among various capital providers
- Gaining a new managerial mindset about how best to approach potential investment partners
- Enhancing their use of objective screening-selection criteria for various capital sources
- Objectively assess any type funding source and capital proposal [term sheet]
- Learning forward-thinking processes to identifying, approaching, and securing new capital
- Bringing new capital sources into the regular line-up of potential investment providers

WHO SHOULD ATTEND?

This training course is suitable to a wide range of professionals but will greatly benefit:

- Anyone looking to expand potential new sources of funds opportunities well beyond traditional commercial banks and investment banks
- Anyone looking to improve financial alternatives for partnering with various capital providers on a wide range of business opportunities and projects
- Anyone looking to identify new sources of funds to support product-service and marketing expansion opportunities
- Board Members looking to enhance the range of capital provider alternatives to support long-term strategic initiatives and industry-market positioning
- Business Development Directors looking to proactively open up new dialogues with a broad range of potential capital providers, each with differing motives and selection criteria

Course Outline

Examining the Global Continuum of Capital Providers

- Commercial Banking
- Investment Banking
- Debt Instruments
- Equity Investment Products
- Basics on Risk Assessment, Exposure, and Management
- Federal, State, and Local Government Funds, Grants, and Partnership Allocations
- Define: Seed, Angel, VC, PE, Hedge Stages of Investment Profiles and Expected ROI

Individual Accredited Investors [Angels] and Angel Networks-Associations

- Qualified High-Net-Worth Criteria for Individual Risk Exposure
- Very Early-Stage “Ground Floor” Investment Opportunities and ROI Expectations
- Dealing with Individual Angel Investors and Angel-Investor Funds
- Convertible Notes – Cumulative Interest and Conversion Pricing-Features
- Series A Preferred Stock [Cumulative and Convertible Features]
- Voting Common Stock for Angel Investors
- Key Components of Angel Investor Term Sheets: Project Timing and Risk Profile
- C-Corporation, Limited Partnerships, S-Corporations, Limited Liability Companies

Venture Capital [VC] Firms

- The Risk Profile and Investment Expectations of VCs
- VC Portfolio Approaches to Investments and Selection Criteria
- Venture Stage/Life-Cycle and VC Investment Uses of Funds
- Small “Frontier” VC Entities
- Midsize “Working Capital” VC Firms

Private Equity [PE] Firms

- History and Typical Life-Cycles of PE
- Securities That Comprise “Private” Equity: Time Horizons and Relative Betas
- “Private” Equity vs. “Public” Equity ... Valuations, Risk Profiles, Investment Expectations
- Liquidity vs. Illiquidity Concerns for Private Equity Management
- Market Efficiency and the Value of Information
- Active Company Involvement vs. Passive / Non-Involvement and “Value” Investing
- Mergers and Acquisitions [M+A] and PE Opportunities

Hedge Funds

- Nontraditional Investment Profiles and ROI Expectations of Hedge Funds
- Basics on: Arbitrage, Short Positions, Derivatives, Bonds, Index Funds, and ETFs
- Structures of Hedge Funds
- Strategies of Hedge Funds
- Assessment-Performance and Mark-to-Market for Hedge Funds
- Institutional vs. Individual Capital for Hedge Funds

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