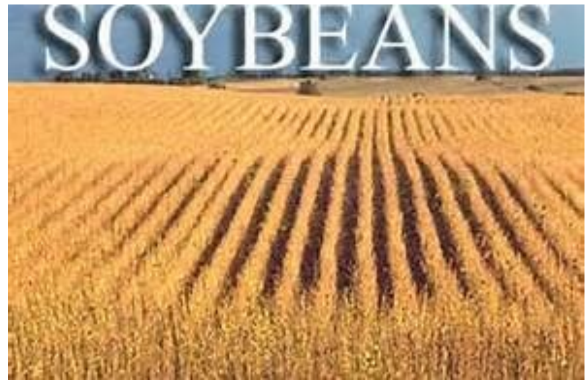
THE FOODGROUP

Food and Agribusiness Acquisition Consulting Services Since 1992



Food Industry Expertise

We understand the industry from a personal perspective having served as leaders from the sectors we serve. Our team has first hand experience leading all aspects of the business development process, from planning, developing a list of targets, making initial independent third party contact to test interest levels using a non-threatening approach. From valuations, negotiations, coordinating due diligence teams and process, to closing the deal our finance, accounting and legal teams are some of the best in the industry, and have worked on small, medium and large transactions with success. What makes us unique is our work with small to medium-sized, privately-held companies and our ability to provide a full service or menu of services that fit your needs. Our work is trust based and cumulative. What you need in this process are experienced professionals who have essential expertise. We have that background.

Call: Michael Cooper 480-924-1220
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Where Food, Agribusiness and Life Sciences Intersect

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From the farm to the supermarket

M&A Process—from target identification thru completed purchase:

Our experienced team can assist you in identifying and contacting prospective clients professionally from an unbiased third party approach that puts target companies at ease—we talk with our network frequently and often are trust advisors.

Valuation and Analysis Expertise:

We understand the marketplace and valuation approaches. With close connections to the market and recent transactions, we have a perspective on multiples and alternative approaches for securing value. We are experts at managing the negotiations process.

All form of protein products—from poultry to seafood

Financing and Deal Structure:

We have worked with all major financial institutions in securing various creative financing alternatives including various forms of senior debt, term debt, bonds and stock offerings for both public and private companies.

Pricing Options:

Full Service—industry standard pricing based on transaction value (5% of 1st $2 million , plus 4% on amount over $2 million but less than $4 million, plus 3% on amount over $4 million but less than $6 million , plus 2% on amount over $6 million but less than $8 million of deal value plus 1% on amount above $8 million

(Example: $50 million deal—5% 1st $2 million=$100,000, 4% 2nd $2 million=$80,000, 3% of 3rd $2 million $60,000, 2% of 4th $2 million=$40,000 and 1% of amount in excess of $8 million=$420,000. Total Service Fee: $700,000)

Food companies are our specialty—any where in the food chain

Fixed Pricing—We also provide fixed pricing alternatives based on deal specifics with an initial retainer of $80,000

Specific Services—We provide a menu of services that can be contracted for individually depending on your needs (negotiated separately).

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