# Company Overview



# Paradigm Capital International

A global financial services company with a proven track record of success.

Our core expertise focuses on global distribution, capital raising, product design and marketing.

Founded in 2013, the Paradigm team covers the globe and our network expands out throughout the Americas, Europe, Africa, Middle East, Asia and Australia markets.

The global team's collective experience working internationally, and our reputation and local knowledge of these diverse markets allows our clients the opportunity to enter and penetrate attractive markets effectively and efficiently.



## What **we do**

### connecting our clients with their goals

### CAPITAL RAISING

The team covers capital raising from both the Institutional and Retail channel of the global financial services industry. Our capital sourced clients include Banks, Family offices, Sovereign funds, Broker dealers, Insurance companies and Independent Advisors that are located across the globe. Our local teams provide the positioning of the product and solutions for our partners to raise the capital efficiently and successfully.

### GLOBAL DISTRIBUTION

The team is locally based throughout the globe and have deep connections with our clients. We provide accessibility to the largest financial and non-financial institutions globally to allow our partners to penetrate markets abroad efficiently and cost effectively. The team have the track record with the client relationships to provide the successful onboarding, signing up and launching of our partners' solutions

### PRODUCT DESIGN

The team has extensive experience working with the largest global financial institutions. Our deep knowledge of the competitive environment and local market allows us to provide critical feedback and design advice on our partners' products and solutions. Pricing, structuring, legal consultation, regulatory compliance are key areas we focus on to make sure the solutions are successful when launched into global regions.

### MARKETING CONSULTING

Through our understanding of our global clients we are able to provide localized consulting services that allow our partners to tailor their marketing and messaging for the regional markets they enter. The team provides advice on product materials, marketing and brand positioning, competitive analysis and digital media to allow our partners to be successful in diverse countries and cultures globally.

### LEGAL AND REGULATORY COMPLIANCE

Our deep knowledge and understanding of the regions we operate allows our team to successfully navigate the regulatory aspect of the local market. We have the necessary team members and outside counsel to provide critical advice on how investment solutions should be structured and designed for a successful launch into the various global markets.

## Who we do it for

### Our team focuses on a diverse range of industry sectors



The team supports asset managers seeking access to capital from financial institutions located around the globe. We provide assistance on the appropriate legal structures, distribution agreements and local sales and marketing support to successfully launch asset management funds.

### Private Equity/Private Debt

Our global team provides our Private equity partners access to a select group of financial institutions to target unique and tailored deals. We provide the necessary introductions and support the deal from all perspectives to make the transaction a success

### **Real Estate Developers**

We provide our Real estate developers and sponsor partners access to global capital – Equity, Senior Debt and Mezzanine financing though our global institutional and high net worth channels to fund their projects. From the largest global sovereign funds to regional family offices we provide our partners with the key stake-holders access of these groups

### Financial Technology Providers

We provide leading global financial technology providers access to our global financial institutional partners to showcase their innovative digital investment solutions. Our team provides access to the key stakeholders and decision makers of these banks and financial institutions to get a rapid response.

## Who **we are**

The group offers leading global investment solutions distributed through the world's largest financial institutions.

The team is based around the globe from New York, London, Miami, Seattle, Buenos Aires, Sydney, Singapore, Hong Kong, Cape Town, Los Angeles, Dubai, and cover the major regions and markets for our clients and partners.



Mark Kaplan - Managing Partner, Co-founder Mark has over 20 years experience in the global capital markets and has been directly responsible for raising over \$15b in AUM in various companies. Based in Stamford, Connecticut

Jorge Gutierrez - Managing Partner, Co-founder

Jorge has over 20 years of investments sales and private banking experience in HNW retail and wholesale U.S. onshore, offshore and Latin American markets. Based in Miami, Florida





Rod Halvorson - Managing Partner, Co-founder

Rod has over 45 years experience in building sales and marketing companies having worked at some of the largest investment companies such as Met Life, US Bank, Symetra. **Based in Seattle, Washington** 

### Maria Mejia - Head of Marketing

Maria has 20+ years of experience developing corporate guidelines, rebrands and marketing materials for financial services companies in multiple markets and languages. **Based in Ottawa, Ontario** 



### AMERICAS



## Who **we are**

EUROPE



ASIA



### MIDDLE EAST









### www.paradigmcapintl.com



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