

► **By The Numbers**

THREE
New Investments

\$95M
Invested

FIVE
New Hires
(1 Promotion)

All numbers are year to date.

► **Team Update**

At Guidepost, we continue to grow and develop our team.

Year to date in 2023, we've added five new investment professionals: Joan Fleischman, Vice President; Colby Fortin, Associate; Calvin Gibson, Analyst; Liv Mulloy, Analyst ('22 Guidepost Summer Analyst); and Sonali Sanjay, Incoming Analyst ('23 Guidepost Summer Analyst).

This year we also promoted one investment team member, Travis McGee, to Senior Associate.



JOAN FLEISCHMAN
VICE PRESIDENT



TRAVIS MCGEE
SENIOR ASSOCIATE



COLBY FORTIN
ASSOCIATE



CALVIN GIBSON
ANALYST



LIV MULLOY
ANALYST



SONALI SANJAY
INCOMING ANALYST

► **New Investments**

NEW

CLASSWALLET

\$40M

End-to-end digital wallet platform for state agencies & K-12 schools

NEW

INTELLUM

\$25M

SaaS-based enterprise eLearning platform for customer, partner & employee education

NEW

SEARCHSTAX

\$30M

Search infrastructure and customer experience technology platform

The above reflects year to date information and Guidepost activity. A full list, and further information, regarding all portfolio companies may be made available upon request.

► **New Value Creation Group (VCG) Advisors**



WALTER DOLHARE
EXPERTISE: STRATEGY & OPERATIONAL FINANCE

Walter Dolhare is a financial services executive with over 30 years of experience. In his multi-decade career at Wells Fargo, he rose to become co-head of Wells Fargo Corporate & Investment Banking, president of Wells Fargo Securities, LLC, co-head of Wells Fargo International, and member of the Wells Fargo Management Committee.

Previously, Walter co-led Wells Fargo Securities and was the former US Vice Chair of the Global Financial Markets Association. He currently sits on the Board of Directors for Guidepost portfolio company ActiveViam.

A native of Argentina, Walter moved to the US in 1986. Walter holds a B.B.A from the University of Notre Dame, which he attended on a tennis scholarship.



BRIAN GOFFMAN
EXPERTISE: STRATEGY & OPERATIONAL FINANCE

Brian Goffman is an experienced enterprise software executive. His background includes leadership of the software practice at McKinsey & Company, where he served a variety of PE-backed software companies in North America and Europe, and VP/GM roles at Samsung SmartThings (via acquisition), LinkedIn, and Microsoft. Brian was also co-founder and CEO of Optify, a marketing automation software firm, acquired by Adobe Marketo.

Brian sits on the Board of Directors for Guidepost portfolio company Shibumi. He was an independent board member at BrightTALK, also a Guidepost portfolio company, acquired by TechTarget.

Brian holds an A.B., Phi Beta Kappa, and an M.B.A. from Harvard University.



SONALI SHAH
EXPERTISE: PRODUCT & TECHNOLOGY

Sonali Shah is a tech executive with 25 years of experience in product management, marketing, corporate strategy, and M&A. She was most recently the Chief Product Officer at Invicti Security, a market leader in the application security space. Prior to Invicti, Sonali ran product management and marketing at Human Security, Veracode and BitSight. Earlier in her career, she was an Investment Banker with Credit Suisse.

Sonali is an advisor to technology startups and to Boston area nonprofits. She sits on the Board of Directors for Guidepost portfolio company Shibumi.

Sonali has an undergraduate degree from Georgetown University, a masters in economics from the London School of Economics, and an M.B.A. from the Wharton School.

RECENT VCG ROUNDTABLES

- Product Marketing with VCG advisor Sonali Shah, Jon Bedard of Bullhorn & Carol Meyers of Rapid7
- ESG with Chelsey Griggs & Lulu Rufael of Atlas
- **Upcoming (September 12, 2023):** Artificial Intelligence – Crafting a POV & Strategy in Growth Stage Tech Companies

► **Guidepost In The News**

Inc. 5000 2023
Three Guidepost portfolio companies named on this year's list

WSJ PRIVATE EQUITY
Guidepost Growth Equity Backs Educational-Technology Company Intellum
Boston-based firm's \$25 million investment marks the first time that Intellum received institutional capital

ACCESSWIRE
Network to Code Adds DevOps Executive Corey Scobie to Board of Directors to Drive Growth
Friday, May 5, 2023 9:00 AM

CISION
ClassWallet Announces Significant Minority Growth Partnership with Guidepost Growth Equity
21 Mar, 2023, 08:30 ET

CISION
Friday, June 30, 2023
Sonali Shah Joins Shibumi's Board of Directors as Independent Director

G.C. 40 GROWTH INVESTOR
Chris Cavanagh named **2022 TOP 40 UNDER 40** growth investor for 2nd year in a row

August 2023 & December 2022
Cradles 2 Crayons



March 2023
Greater Boston Food Bank



Guidepost Gives Back

The Guidepost team strives to volunteer together several times a year. Recently, we helped sort clothing donations for distribution at Cradles 2 Crayons and organized food packages at the Greater Boston Food Bank.