

► By The Numbers



► Team Update

**New Hires**

**JIMMY BALLOUN**  
OPERATING ASSOCIATE

**ANTHONY SCHREDER**  
ANALYST

**EVAN BLACK**  
INCOMING ANALYST

**Promotions**

**TRAVIS MCGEE**  
VICE PRESIDENT

**ESTHER LOVETT**  
ASSOCIATE

**JAKE SPORN**  
ASSOCIATE

► New Value Creation Group (VCG) Advisors

**NATHAN CHRISTENSEN**  
VCG FUNCTIONAL EXPERTISE: GEN AI  
Mineral  
INTELLUM Mineral

**DIANE HAINES**  
VCG FUNCTIONAL EXPERTISE: PRODUCT & TECHNOLOGY  
Mineral, OpenSesame  
Mineral

**JEFF KALOWSKI**  
VCG FUNCTIONAL EXPERTISE: STRATEGY & OPERATIONAL FINANCE  
Rapid7, Imprivata  
INTELLUM SEARCHSTAX

**KATHY PERROTTE**  
VCG FUNCTIONAL EXPERTISE: STRATEGY & OPERATIONAL FINANCE  
ActiveViam  
ActiveViam KAIZEN REPORTING

**2024 VCG ROUNDTABLES**

- Lessons Learned & Future Focus Areas for Chief Revenue Officers
- Developing Strategic HR & Shaping Culture for CEOs
- Building & Enhancing Product Management Capabilities
- Growing Quality Pipeline & Partner / Channel Strategy for CROs
- Annual Budgeting Best Practices for Growth Stage Tech Companies
- Aligning Sales & Marketing in Growth Stage Tech Companies
- Impact of Gen AI & Data Technology in Product

► New Investments & Exits

**NEW** **KAIZEN** REPORTING  
Regulatory reporting and compliance software for tier 1 banks and asset managers  
DIRECTLY SOURCED

**NEW** **PetScreening**<sup>™</sup>  
Pet compliance and policy management software for real estate property managers and asset owners  
DIRECTLY SOURCED (NO BANK)

**EXIT** ActiveViam → NORDIC CAPITAL  
February 2024

**EXIT** Mineral → MITRATECH  
January 2024

► Recent Recognition

**Firm Awards**

**Top Private Equity Firm**

**Inc. Founder Friendly Investors** 2024 **Founder-Friendly Investor** x3

**Top Growth Equity Firm** 2023 x2

**Individual Awards**

**Joan Fleischman**  
Top Women Leader in Growth Investing

**Chris Cavanagh**  
Top 40 Under 40 Growth Investor x3

**Gene Nogi**  
Top Software Investor x2

► Guidepost Gives Back

**COMMUNITY SERVINGS**  
FOOD HEALS

**Community Servings Volunteer Event**  
(Summer 2024)