# _____ Family Office Deal Flow 1 Pager

**Direct Investment Mission (Income, Diversification, etc.)**:

_____

**Values of the Family**: _____

**Extended Team Network to Leverage (Attorney, investment bankers, advisors, team members, board members, etc.)** _____

_____

_____

**Top ____ Industry Focus Areas (Recommended only 1-3 industries)**: _____

**Size of Direct Investment Portfolio:** _____

**Minimum # of Years in Business**: _____

**Minimum EBITDA**: _____

**Minority or Majority/Control Requirements**: _____

**Debt, Equity, Royalty Investment Preferences:** _____

**Embedded Risks in Existing Assets:** _____

**Ideal # of Deals/Year**: _____

**Deal Sources: (Examples: Investment Bankers, Board Members, Single Family Office Syndicate, Wilson Conferences,**
**etc.)**_____

_____

_____

**Target Holding Period (Example: 7-10 years):** _____

**Preferred Exit Type (IPO, Private Sale):** _____

**Deal Approval Process:**

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____