



Concierge Services: Capital Strategies

Business owners often encounter the reality that they must seek external assistance in executing their capital formation plan to achieve specific business objectives. Seeking help from outside experts or consultants can be a difficult decision for business owners who value their independence and self-reliance. However, wise business owners understand that seeking external guidance can often lead to the most efficient and cost-effective path to success for their business and ultimately for themselves when raising capital.

The process of fundraising requires a comprehensive strategy and execution, and each transaction has unique variables that require careful consideration to achieve success. At Stony Hill Advisors, we assist clients in assembling and managing their fundraising activities, allowing them to remain focused on their business operations. Our team of experts understands the intricacies of the fundraising process and can provide valuable insights and guidance to ensure that clients achieve their desired outcomes in a timely and efficient manner.

We consider:

- Is the business prepared? Adequately positioned and qualified? Hindered by time constraints?
- What are the deliverables?
- How much time will it take?
- Can the business afford the cost? (There are always costs and/or fees associated with raising capital, some of which are paid through the process.)
- What is the likely hood of success?
- Who is the inside team?
- Who are the outside service providers?
- What are the best options to achieve stated goals?
- What do the options cost?
- What happens if the undertaking misses the stated goals?

Our concierge services are designed to control clients' costs when undertaking strategies that are second nature to us and foreign to our clients.