

Graeme Plant

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Business Name: Compass Point Capital

Certifications/accreditations: Broker California DRE

Number of Employees: 4

Year Founded: 2005

Services Offered: Buy and sell side mergers and acquisitions advisory

Contact Information

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Business Category

o Mergers and Acquisitions

Geographic Region Served

- o Sacramento Region
- o Northern California
- o Western US

Industry Sectors Served

- o Agriculture/Viticulture
- o Bioscience
- o Energy
- o Food and Beverage
- o Healthcare
- o Hospitality
- o Manufacturing
- o Nonprofit
- o Professional Services
- o Retail

Insights

What led you to do the work you do? I managed the sale of a company that I was running and learned that I liked doing the deal more than anything else I had done in my career.

Describe your ideal client: Our ideal clients are owners of closely held privately owned companies with \$5M to \$50M of revenue and more than \$1M of pretax earnings.

What situation or circumstances might lead a prospective client to your services? Business owners who are considering leaving their companies or those who are looking to accelerate growth by bringing in capital.

What's the best way for colleagues to refer prospective clients to you? A warm introduction is ideal and can be as simple as an email connecting us to the client.

How does a typical engagement begin? We generally start with a phone call

that allows us to learn about why the client is considering a transaction and how the business fundamentally operates.

What services might a typical engagement include? Exploration of the alternatives to a transaction, preparing a marketing package, marketing the company, teaming with other company advisors, negotiating a deal, support through due diligence and preparation of documentation.

What might you be doing if you hadn't pursued this career? I'd either be retired or running a small tech company.

What about your work gives you greatest satisfaction? Helping clients find the right path to meet their objective of exiting a company or getting growth capital.

What might your colleagues be surprised to learn about you?

My business partner and I have been closest friends since we were eight years old.

What do you enjoy doing most when you're not serving your clients? Traveling with my wife, whitewater kayaking, cross country and alpine skiing, riding my bikes.