



**Mittelstand  
Investment  
Platform**

by Sugarwood Financial Partners

## PRESS RELEASE

# MitVest: The new smart finance platform, build for U.S. lenders and German-speaking Mittelstand companies

- ***Bi-lingual corporate finance advice for established companies and start-up's***
- ***Access to a pre-screened circle of liquidity providers and banking partners***
- ***Guidance on balance sheet optimization, building-up credit history, financial structuring and M&A***
- ***Personal Advice and 'Gründlichkeit' included***

BOSTON/CHARLOTTE, May 28<sup>th</sup>, 2019 — MitVest, the new transatlantic platform for advice, access, optimization and efficiency in all corporate finance needs of Mittelstand companies active in the United States, is officially launching today.

The expansion of Mittelstand companies from Germany, Switzerland and Austria into the U.S. market seems to be a success story, but too often investors had to scale down their initial plans due to insufficient funding and other financial challenges. Many European companies in the U.S. are considered start-ups, even if they are mature businesses overseas. This means they have to start without a local credit history. A significant obstacle, not just to get a bank loan, but also when signing lease or insurance agreements.

On the other hand, the U.S. is the biggest financial market in the world, U.S. banks tend to be more open to entrepreneurial risk than their European peers and can provide various solutions beyond traditional bank loans. What is missing is a mutual understanding between both sides.

### **Partner for innovation-oriented lenders and expanding Mittelstand corporations**

“MitVest is the very first orchestrated approach to bring these two worlds together, through a smart and interactive finance and advisory platform. The concept is built on the core believe that market intelligence goes hand in hand with financial expertise” said Stefan Götz, Co-Founder and Head Corporate Finance of MitVest. “We analyze the clients’ current and future business models, involve industry experts and determine the company’s financial needs. Based on this, Mittelstand clients get access to a pre-screened circle of liquidity and finance providers, everything prepared and optimized with the help of MitVest” adds Martin Raab, Co-Founder of MitVest.

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The platform and its agile and structured process matches professional lenders and expanding companies by balancing risks and opportunities, and thus Mittelstand clients are able to bypass waste of time, frustration and disadvantageous financial conditions.

### **Transatlantic High-caliber team**

MitVest has opened local offices in Boston MA and Charlotte NC as well as a Pan-European service desk in Zurich (Switzerland). The platform was founded by **Stefan Götz**, former Manager of the German Desk at Deutsche Leasing USA, Chicago and **Martin Raab**, Founding Partner of Sugarwood Financial Partners, LLC and Senior Investment Executive, commuting between Europe and the United States.

Also, MitVest is establishing a dedicated Advisory Board with outstanding expertise to center competencies available for clients: Currently the Advisory Board is joined by **Dr. Ulrich Dilling**, **Caroline Blaser** and **Ludwig Fischer**.

**Dr. Ulrich Dilling** has been Member of the Executive Board of MAN Truck & Bus AG until December 2018. He has extensive knowledge in the global Automotive sector, including M&A and merger integration experience.

**Caroline Blaser** is Head of the Swiss Business Hub USA, where she is advising companies on their US market entrance, as well as helping U.S. investors to find their way to Switzerland. She has previously been responsible as a Director for the Swiss Business Hub Canada. She is an expert of the US market and transatlantic export and investment initiatives.

**Ludwig Fischer** is Partner at Invigors, Part of The Alta Group. Previously has he has served as the Managing Director of GE Capital Germany as well as Director Finance & Operations at Hewlett Packard Germany. He is a proven expert in financial management, market expansion and sales & distribution strategies.

### MEDIA CONTACTS

*This press release is available in German too. Availability for interviews or quotes at any time. Please provide information for which newspaper/portal you are contributing/working; **editorial usage of any pictures and material is allowed without special copyright permission.***

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## ABOUT

The **MitVest** platform is operated by Sugarwood Financial, a U.S. Registered Investment Advisor specialized on investment solutions for Mittelstand companies. The group advises on various aspects of corporate finance including external funding, balance sheet optimization and maintains contacts to more than 100 Mittelstand companies active across America as well as one dozen different Liquidity Providers (as of April 2019).

[www.mitvest.com](http://www.mitvest.com)

IMPORTANT INFORMATION: MitVest and/or Sugarwood Financial Partners, LLC is not a Securities Broker/Dealer, Mortgage Broker, Mortgage Lender, Mortgage Servicer and/or Mortgage Origination Supporter. We do not affect securities transactions in connection with the transfer of a privately held company ("Share Deals").