Corporate Facts Sheet

Headquarters: Los Angeles, California

Year Founded: 1956

Who We Are

Founded in 1956, Corporate Finance Associates Worldwide (CFAW) provides clients with financial advisory services and access to capital resources to help business owners successfully sell, buy or finance a business. As one of North America’s largest investment banking firms serving middle-market businesses, we are a respected advisor to private corporate clients, as well as public companies. CFAW is known for superior M&A advisory skills and capital raising expertise that have resulted in the facilitation of thousands of transactions over the last five decades. Our investment banking professionals provide a broad range of services in support of mergers, acquisitions, divestitures, capital raising and corporate restructuring. Local service is provided by over 30 offices in the United States, India, Belgium, Denmark, Ireland, Netherlands, Switzerland and United Kingdom.

Our Business

We deliver professional M&A and corporate finance advisory services to middle-market businesses by continually improving our processes, growing our organization and serving the diverse needs of our clients. We remain focused by serving as our clients’ partner and guiding them through every challenge, advocating on their behalf, and leveraging our company’s wealth of experience and resources to see them through to a successful close. To ensure that we deliver unbiased guidance we are committed to remaining independent from any direct lending or investment capital affiliates. Selling, buying or financing a company is a complex process that requires thorough preparation, skillful negotiation, and intimate market knowledge. At CFAW, our clients work throughout the engagement on a personal basis with a local senior principal, who can provide expert valuation, analysis, and deal-making skills, as well as preferred access to national and international buyers, sellers and financing.

Industry Specialization

Services

Ownership Transfer
- Sale of a Business
- Recapitalization
- Partner Buy Out

Acquisitions
- Acquisition Searches
- Acquisition Financing
- Consolidation Strategies

Financing For
- Growth and Expansion
- Strategic Acquisitions
- Buying Out a Partner
- Funding a Turnaround
- A Recapitalization

Consulting
- Valuations
- Exit Strategy
- Value Enhancement
- Strategic Planning

Other
- Joint Ventures
- Strategic Alliances

Offices In North America

Corporate Office
Los Angeles, California

New England Region
Portland, Maine

Southern Region
Atlanta, Georgia
Lexington, Kentucky

Midwest Region
Columbus, Ohio
Minneapolis, Minnesota
Omaha, Nebraska

Southwest Region
Austin, Texas
Houston, Texas
Dallas, Texas
Midland, Texas
San Antonio, Texas

Rocky Mountain Region
Denver, Colorado

Western Region
Los Angeles, California
San Diego, California
San Francisco, California
International Offices

Europe

Austria
Vienna, Austria

British Isles
Dublin, Ireland
London, United Kingdom
Nottingham, United Kingdom

Belgium
Brussels, Belgium

Germany
Frankfurt, Germany

Italy
Milan, Italy

Netherlands
Amsterdam, Netherlands

Poland
Warsaw, Poland

Spain
Barcelona, Spain
Madrid, Spain

Switzerland
Lugano, Switzerland
Zurich, Switzerland

Asia

Hong Kong

India
Mumbai, India
Pune, India

Latin America

Mexico
Mexico City, Mexico

Executive Team

Jim Zipursky
Chairman & CEO

David Sinyard
Vice-Chairman & CFO

Oliver Drews
Vice-Chairman International

Peter Heydenrych
Industry Practice Groups

Terry Fick
Best Practices

Roy Graham
Marketing
Key Events in the Growth of CFAW

1956  Mike Rothberg launches CFA in Greenville, South Carolina
1966  CFAW records first $5 Million transaction
1969  First international partner established in Switzerland
1972  Corporate offices move to Atlanta, Georgia
1975  CFAW grows to 15 offices in 10 states and records first $10 Million transaction
1980  CFAW conferences launched to share client needs, facilitate training and best practices
1984  CFAW records first $25 Million transaction
1985  CFAW moves headquarters to Denver, Mike Rothberg retires and Jim Sorenson becomes CEO
1988  CFAW records first $100 Million transaction
1996  Management buy out of CFA. Morley Zipursky is elected Chairman
2002  Terry Fick elected Chairman, Morley Zipursky honored as Chairman Emeritus
2003  Peter Heydenrych elected Chairman and CEO
2004  CFAW expands to 40 locations worldwide
2005  CFAW headquarters moved to Los Angeles
2006  CFAW celebrates 50th anniversary
2007  CFAW records first $175 Million transaction
2007  CFAW established affiliated broker dealer Corporate Finance Securities, Inc.
2009  New offices added in Mumbai, Pune and Bangalore, India
2009  CFAW records first $500 Million transaction
2012  CFAW Top Ten in Thomson Reuters League Tables
2016  CFAW Celebrates 60th anniversary
2018  Jim Zipursky elected Chairman and CEO
2019  CFAW expands global presence with offices in Belgium, Denmark, Ireland, Netherlands, Switzerland and United Kingdom
2020  CFAW adds new offices in Frankfurt, Lisbon, Paris, Barcelona, Madrid and Milan
2021  CFAW adds new office in Vienna
2022  CFAW adds new office in Fort Lauderdale and Warsaw, Poland

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