



INTRODUCTION TO CB CAPITAL PARTNERS

CB CAPITAL PARTNERS

- CB Capital Partners is a specialized investment banking firm that creates value through customized financial advisory assignments and by delivering high quality investment banking services to our clients. Our investment banking professionals have strong Wall Street experience and cater to small and middle market companies. We offer companies the expertise and capabilities of a large investment bank combined with the focused attention of an entrepreneurial firm.

INDUSTRY FOCUS

- CB Capital Partners brings value-added solutions to our clients through a partnership with our banking professionals and board members. This partnership provides our clients with an industry-knowledgeable team dedicated to their success. CB Capital Partners has proven expertise in the following four primary areas:
 - Clean Technology & Energy
 - Consumer, Financial & Retail
 - Healthcare, Medical Devices & Services
 - Natural Resources & Technology
- Industrial Manufacturing & Real Estate

STRATEGIC RELATIONSHIPS

- In December 2008, CB Capital Partners entered into a partnership agreement with Everbright in an effort to expand upon its cross-border investment banking and financial advisory practice in China. 
- In 2002, CB Capital Partners entered into a contractual relationship with its FINRA broker-dealer Elevation LLC to provide our clientele access to investment financial services and products. 

CB CAPITAL CONTACT

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TRANSACTIONS

\$1,500,000



Common Stock
The undersigned acted as placement advisor to Allegro Ophthalmics, Inc.



April 2012

CB Capital Partners' investment bankers played an integral role in the successful \$1.5 million Common Stock financing of Allegro Ophthalmics, LLC. Allegro is introducing a proprietary drug to treat neovascular eye diseases such as Wet Age-Related Macular Degeneration and Diabetic Retinopathy.




The undersigned provided a fairness opinion to The Wiki Group, Inc.




January 2012

CB Capital Partners' investment banking team provided a fairness opinion to The Wiki Group, Inc. and acted as advisor to the Company's subsequent merger of WikiPay, Inc. The Wiki Group is a California based technology company dedicated to making financial transactions simple, social, secure and affordable.

\$2,000,000



Senior Credit Facility
The undersigned acted as placement advisor to LA Boxing Franchise Corp.



March 2012

CB Capital Partners' investment bankers played an integral role in the successful \$2.0 million Senior Credit financing of LA Boxing Franchise Corp. LA Boxing the nation's leading boxing, kickboxing and mixed martial arts franchise gym with facilities located both domestically as well as internationally.

\$1,700,000



Convertible Credit Facility
The undersigned acted as placement advisor to MediaPass, Inc.



December 2011

CB Capital Partners' investment bankers played an integral role in the successful placement of \$1.7 million in a convertible debt facility for MediaPass, Inc. MediaPass is a powerful, easy-to-use subscription solution for online content offering web publishers an efficient way to monetize their online material, articles, videos and podcasts.

CB CAPITAL PARTNERS

CB Capital Partners was founded with the goal to deliver the highest quality investment banking services to our clients. We define quality as bringing innovative and value-added solutions to our clients through a conservative and disciplined application of our diverse professional banking talents. CB Capital's experienced professionals help clients analyze financial alternatives, identify strategic and financial sources of capital, and structure and negotiate terms, which meet their objectives.

We offer our clients:

- Expertise in every phase of strategic advisory and corporate finance;
- Extensive transaction experience in all investment banking products;
- Industry expertise in our focus areas - health care, consumer & retail, technology and industrial manufacturing;
- Significant and industry contacts.

Mergers & Acquisitions

The professionals at CB Capital Partners have advised hundreds of clients with their Merger & Acquisitions and other financial advisory needs. Our clients range from large corporations to family owned companies. Our full range of Merger & Acquisitions advisory services includes:

- Buy-Side and Sell-Side Advisory Services
- Fairness Opinions and Valuation Services
- Divisional and Subsidiary Divestitures, Spin-Offs and Spin-Outs
- Management and Leveraged Buyouts
- Recapitalizations
- Strategic Partnerships and Investments
- Takeover Defense
- Financial Restructuring and Reorganization

CB Capital Partners develops customized Mergers & Acquisitions strategies designed to maximize shareholder value.

Private Placements

CB Capital Partners has extensive relationships with the private equity community and we are positioned to structure transactions on the best possible terms. Collectively, our professionals have represented over 100 companies in their capital-raising needs. CB Capital Partners offers a full menu of financing strategies for our clients, including:

- Growth and Acquisition Capital
- Going Private Transactions
- Management Buyouts
- Leveraged Buyouts
- PIPEs (Private Investments in Public Companies)
- Recapitalizations
- Debt Refinancing
- Partial Sale or Partial Recapitalization

Each customized process includes the full range of services from identifying a universe of potential investors to bringing the right party to the client and negotiating for the appropriate valuation.

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