

Twelve Points Proudly Launches Twelve Points Business Advisors

August 29, 2022 - Twelve Points is proud to announce the launch of its newest division, Twelve Points Business Advisors. Through this new group, the firm will now offer investment banking services, assisting companies through a full range of corporate transactions including but not limited to mergers and acquisitions, restructuring, business valuations, recapitalizations, stock repurchases, bank financing, strategic alternatives, and other general advisory matters.

Historically, Twelve Points has been a trusted advisor for retirement services and private wealth management for entrepreneurs, corporations, and organizations. Now, through Twelve Points Business Advisors, these same clients will be able to work with Twelve Points to assist them through any strategic advisory transaction.

Heading up this new division is Laura M. Moruzzi, a seasoned professional with 28 years of investment banking experience in mergers and acquisitions, business valuations, and corporate finance for privately held and family-owned companies.

Moruzzi brings experience and dedication to her new role as head of Twelve Points Business Advisors. "I view myself as a trusted advisor," shares Moruzzi, "A lot of our clients are entrepreneurs. They are working with Twelve Points already on 401(k) and private wealth management. Eventually, these clients will need to go through a transaction. Who is better to represent them than their trusted advisors at Twelve Points? We can now be there for them throughout the natural lifecycle of their business."

Ms. Moruzzi has advised boards of directors and special committees on corporate strategy decisions and has served as a non-voting board participant for both public and privately held companies. She has completed numerous merger and acquisition transactions ranging in size from \$10 million to \$200 million and several debt and equity capital raising transactions ranging from \$2 million to \$40 million.

Through this new division, Moruzzi plans to assist both new and existing Twelve Points customers with the strategy, execution, negotiation, closing, and transition of business transactions.

With the help of Twelve Points Business Advisors, business owners will be provided with a personal approach to their proposed business transaction. Whether it is considering a sale or other corporate finance activities, the Twelve Points Business Advisors team will help evaluate and assess the feasibility of a transaction. They will work with business owners to develop a personal financial plan and represent them in the negotiation and closing process. Finally, business owners will be able to lean on their Twelve Points Business Advisors team to assist them with a successful transition.

The launch of Twelve Points Business Advisors rounds out the full services offered by the firm, allowing clients to depend on Twelve Points as their trusted advisor throughout the entire business lifecycle. To learn more Twelve Points Business Advisors, visit their website at www.twelvepointsbusinessadvisors.com

About Twelve Points

Twelve Points is a full-service firm providing individuals and families with comprehensive wealth management services. We also provide corporations and organizations with retirement services. We welcome you to visit our website that is most appropriate for your needs and goals. To learn more, visit twelvepoints.com.