

TYPE HIERARCHY

Heading and Subhead

56

Montserrat Family ipsum dolor sit amet

50

Montserrat Family ipsum dolor sit amet

44

Montserrat Family ipsum dolor sit amet

36

Montserrat Family ipsum dolor sit amet

32

Montserrat Family ipsum dolor sit amet

30

Montserrat Family ipsum dolor sit amet

Body Text

24

Montserrat Family ipsum dolor sit amet

20

Montserrat Family ipsum dolor sit amet

18

Montserrat Family ipsum dolor sit amet

Label

16

MONTSERRAT FAMILY IPSUM DOLOR SIT AMET

12

MONTSERRAT FAMILY IPSUM DOLOR SIT AMET

COLORS SCHEME

PRIMARY

00478A

000E2D

B284B9

F6F9FD

FEFEFF

ACCENT

720BD2

0073CF

00A007

FFC600

D7181F

UI ELEMENTS

BUTTONS AND DROPDOWN

MY DEALS

EXPORT

+

Default

Hover

Active

MY DEALS

MY DEALS

MY DEALS

MY DEALS

ALL DEALS

LINKS

VIEW ALL IN-PURSUI TS DEALS >

TABS

ALL

RESEARCH

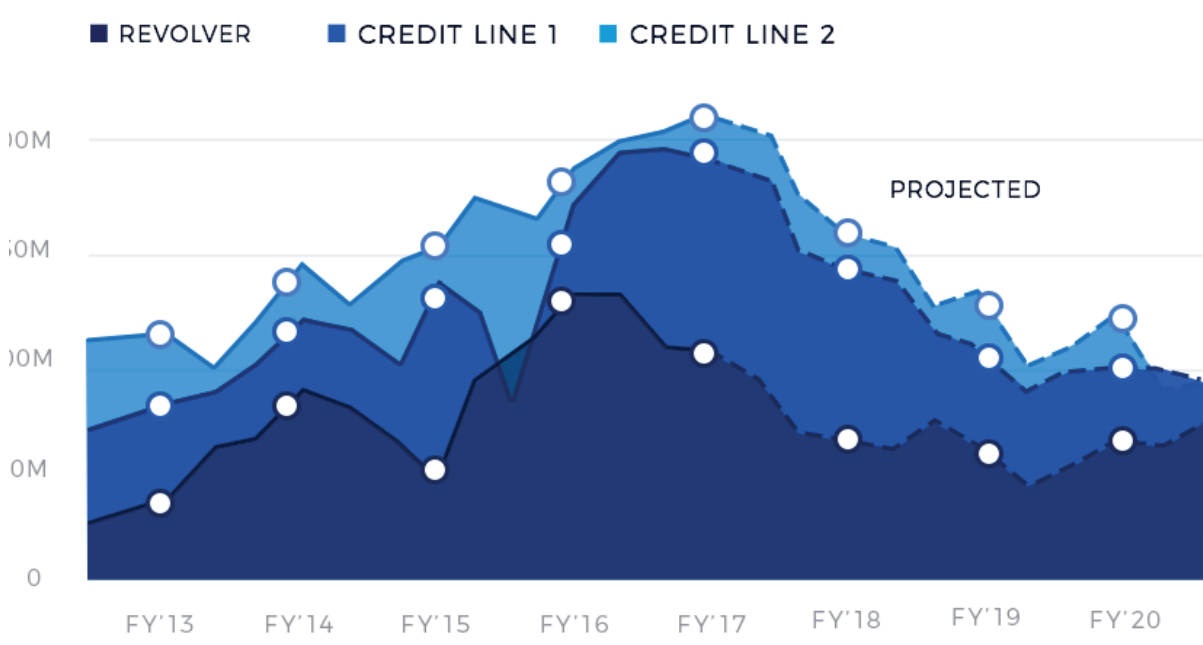
FINANCIALS

AML/KYC

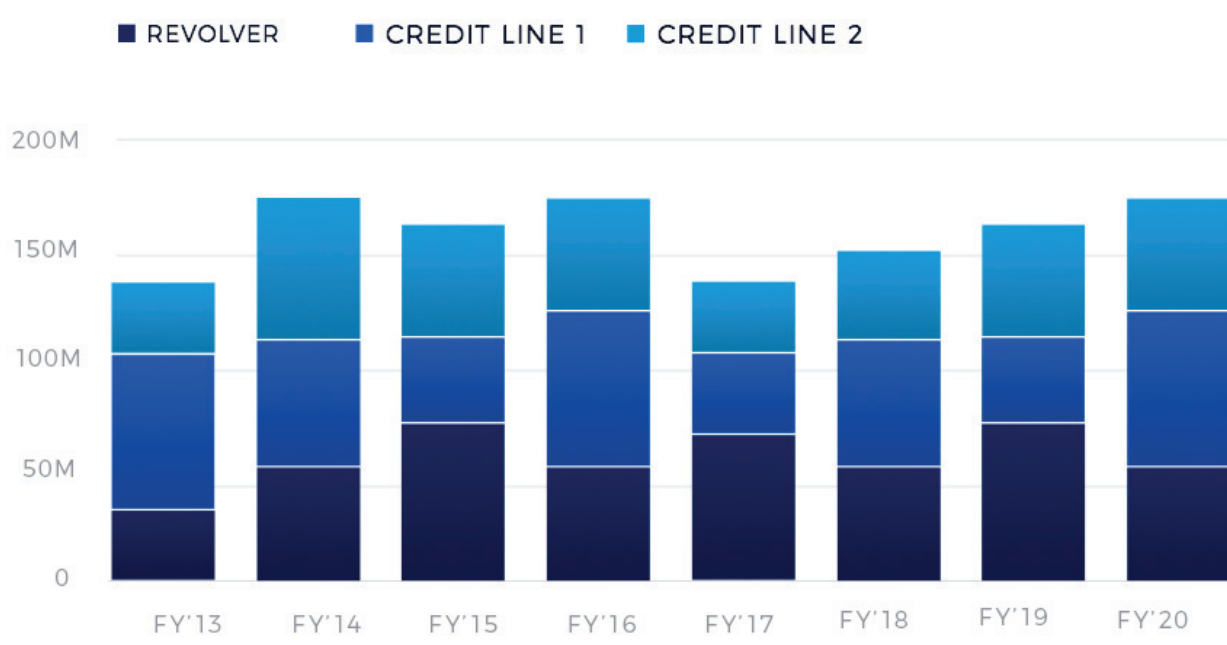
1 PURSUIT ASSIGNED TO ME

12 PURSUITS ACROSS COVERAGE TEAM

LINE GRAPH



BAR GRAPH



TABLE

PRODUCT TYPE	TOTAL DEBT	TOTAL EARNINGS	MATURITY DATE	COMING DUE AMOUNT
Revolver	\$1.1M	\$600K	06/15/17	\$500K
Line of Credit	\$1.1M	\$600K	06/15/17	\$500K
Line of Credit	\$1.1M	\$600K	06/15/17	\$500K
TOTAL	\$8.1M	\$1.95M		
Revolver	\$1.1M	\$600K	06/15/17	\$500K
Revolver	\$1.1M	\$600K	06/15/17	\$500K
Revolver	\$1.1M	\$600K	06/15/17	\$500K

CARDS

DEAL 928329

RESTRICTED

Your colleague **Kate** posted a new document -- "new pitch deck".

24 mins ago

DEAL 928374

Your colleague **Kate** met with **Jim (CFO)** regarding check-in.

24 mins ago

MERGER & ACQUISITIONS

Is Rite Aid still worth it for Walgreens?

5 mins ago by Bloomberg

#Walgreens #Riteaid #Merger blocked by #FTC citing #antitrust concerns

6 mins ago by @DrM2uber1

Default

Hover

Harland Williams

CEO

BOARD

Relationship Strength

(Within the last 60 days)

20

CHECK IN

1

ENTERTAINMENT

1

PITCH

CLIENT DETAILS

ADD +

Recently travelled to Cancun, Mexico

By John Norton

jmacus@abccorp.com

917.938.9283

schedule a meeting





DEAL ID: 922634

RESTRICTED

ACTION

▼

STATUS: PURSUIT (ON TRACK)

VIEW DETAILS >

Deal description cing elit. Aenean euismod bibendum laoreet. Proin gravida dolor sit amet lacus accumsan.

FUNDING SOURCES >

ENTITY LINKAGES >

MAIN CLIENT CONTACT



Jane Watts

Senior Vice President

DEAL TEAM LEAD



Albert Turner

Senior Manager

PRODUCT INVOLVED

Line of Credit  
Bond  
Term Loan

2 other banks involved >

TOTAL DEAL SIZE

\$3.5M

TOTAL COMMITMENT

\$2.5M

TOTAL ESTIMATED SPLIT OF FEES

\$10M

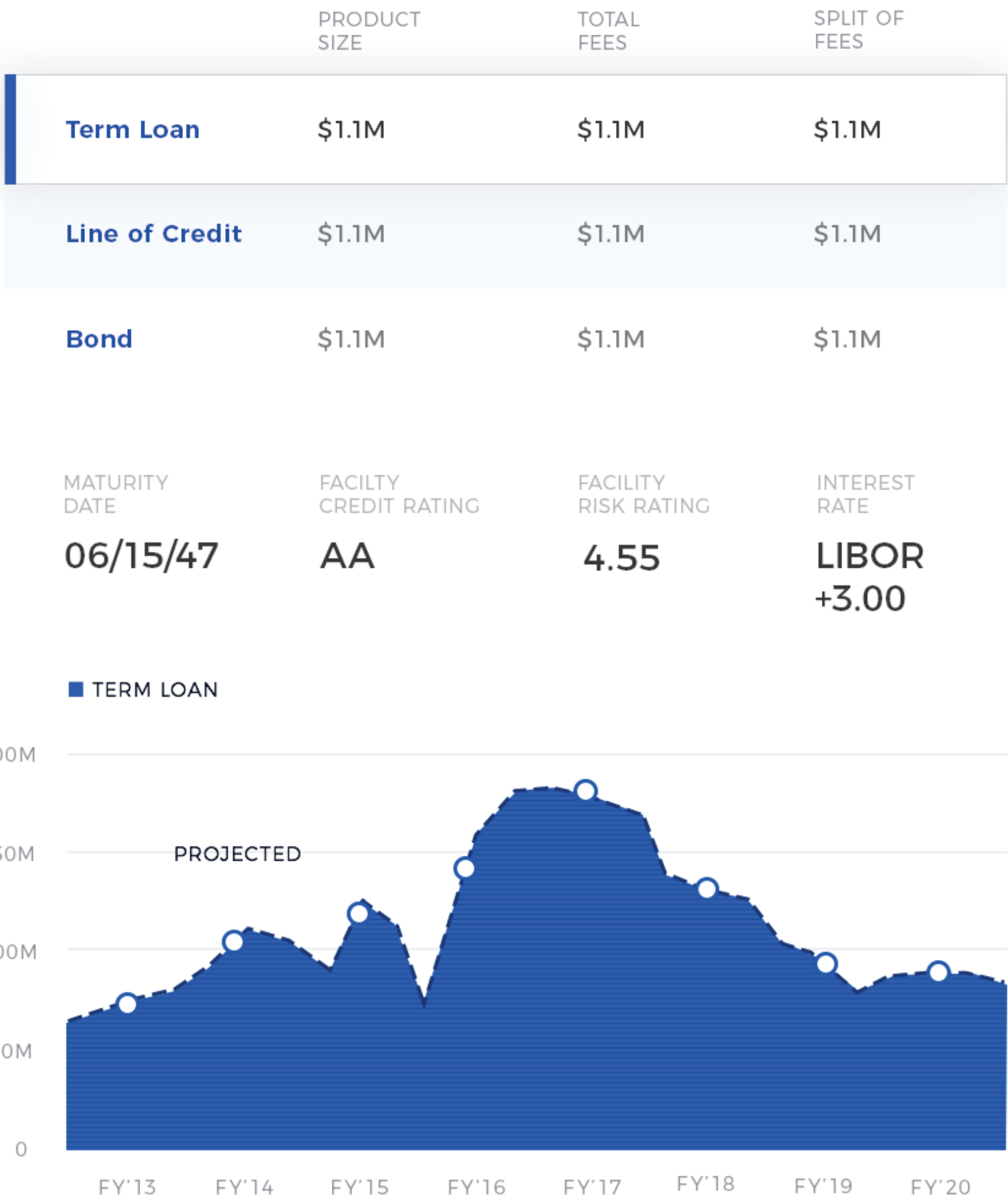
DEAL PROBABILITY

20%

PRODUCT REVENUE

(Bank fees generated from client.)

EXPORT



NOTES

TEAM MEMO

24 mins ago by Albert Turner

Lorem ipsum dolor sit amet, coorem ipsum dolor sit amet, consectetur elit

MEETING NOTE

24 mins ago by John Norton

Lorem ipsum dolor sit amet, coorem ipsum dolor sit amet, consectetur elit

TEAM MEMO

24 mins ago by Albert Turner


Lorem ipsum dolor sit amet, coorem ipsum dolor sit amet, consectetur elit

VIEW ALL DEAL RELATED NOTES >

DOCUMENTS

1 NEW

(All client-related materials.)

TYPE	NAME	UPLOADED BY
	Deal Structure	John Norton

DEAL FEED

John Norton has uploaded a document and updated the deal structure.

24 mins ago

You posted note regarding a meeting with Harland (CEO) and David (CFO).

24 mins ago

Edwin Tyler has posted two documents.

24 mins ago

M&A opportunity created.

24 mins ago

VIEW ALL DEAL ACTIVITY >

CONTACTS

DEAL TEAM

(Sorted by strength of relationship)



Edwin Tyler

CPO



John Norton

Senior Vice President



Albert Turner

Senior Manager

LEAD

VIEW ALL DEAL TEAM CONTACTS >

KEY CLIENT CONTACTS

(Sorted by strength of relationship)



Jane Watts

Senior Vice President

LEAD



David Sanders

CFO