

Featured Member Spotlight
April 2021

ACG Philadelphia's Featured Member Spotlight is designed to help foster new, meaningful connections by generating greater understanding of our members, their roles, and their needs. On a monthly basis we will recognize dealmakers across functions and career stages. Meet them at our upcoming Breakfast Briefing, reach out via email or find them on LinkedIn.



[Graham Bachman](#), Director of Business Development

[Context Business Lending](#)

GrahamB@contextbl.com

ACG Philadelphia Membership Committee

Tell us about your role / firm. Context Business Lending is a family office-backed specialty finance company focused on providing flexible working capital to businesses that do not qualify for traditional back financing. My role is to manage and maintain our marketing efforts while also building and nurturing relationships with intermediaries to find and do initial diligence on appropriate opportunities for us to provide debt financing.

What are you looking for? 2020 provided us with a generational opportunity to prove our ability to support our borrowing partners and trusted intermediaries, we capitalized on the opportunity by quadrupling our portfolio and strengthening our relationships in spite of being 100% remote. We continue to seek opportunities to provide working capital solutions via asset-based lines of credit to businesses that are currently, but not inherently, unbankable.

What's on your mind? Our slogan is, "Consider ABL Disrupted" and we mean it. I want to learn about the latest trends in financing, use of technology, personnel and industry shifts. At CBL, we launched an eCommerce lending division with the explosion of Direct-to-consumer online businesses. We try to be leaders in the use of data and technology in what we think is a largely antiquated industry of asset-based lending.



[Jim Caruso](#), CFO

[J. Knipper and Company & KnippeRx](#)

james.caruso@knipper.com

ACG Philadelphia Private Equity-backed Executives Roundtable (PEER) Committee

Tell us about your role / firm. I am the CFO of J. Knipper and Company, Inc., a leading healthcare solutions company serving the pharmaceutical, biotechnology, and medical device industries. Knipper is backed by Court Square Capital Partners. I joined Knipper in February 2021, after four years as CFO with a private equity-backed home healthcare company, where I helped facilitate a successful \$575 million exit.

What are you looking for? We completed the acquisition of Eagle Pharmacy in November 2020, and are actively pursuing additional acquisitions in our marketing solutions, third party logistics, samples management, and custom pharmacy solutions segments.

What's on your mind? I am focused on leading Knipper's finance team in support of our mission to create the shortest path between patient and therapy. We are building-out the finance infrastructure to support accelerated organic growth

in our core businesses, integration of Eagle Pharmacy and future acquisitions, as well as the launch of our new third-party logistics services business.



[Julie DeLuca](#), Vice President, Sales, Northeast

[Vervent](#)

jdeLuca@vervent.com

ACG Philadelphia Women's Committee Chair

Tell us about your firm. As one of the pre-eminent Lending as a Service (LaaS) companies, Vervent sets the global standard for outperformance by delivering superior expertise, future-built technology, and meaningful services that empower companies to accelerate business and drive compliance. We support our industry-leading partners with primary strategic services including Loan & Lease Servicing, Call Center Services, Backup Servicing/Capital Markets Support, Credit Card Servicing, and Card Marketing & Customer Acquisition.

What are you working on? In my role as VP of Sales, Northeast, I specialize in capital markets deals sharing Vervent's proven, tech-forward, and efficient approach to help companies grow businesses in highly regulated industries. My goal is to empower client partners to focus on their core competencies while we handle their servicing solutions and securitization needs. As a growing, dynamic fintech company with a roster of A-team players, Vervent has the skills, expertise, and infrastructure to support partners across the spectrum of industries as a one-stop shop for servicing and service support.

What are you interested in talking about? I'm always happy to talk about solutions for your business, new trends in the industry, etc. Additionally, as the chairperson for ACG Women's Committee/Philadelphia ACG, mentorship and collaborations on ways to increase access and appeal for young women to pursue careers in Finance are topics I'm passionate about.



[Adrian Ironside](#), Partner

[Guardian Capital Partners](#)

aironside@guardiancp.com

ACG Philadelphia Programs Committee & ACG University Committee

Tell us about your role: I am a Partner at Guardian Capital Partners, an operationally focused private equity firm. I lead all phases of the investment process for my deals, from sourcing and evaluating opportunities through execution and partnership with our management teams culminating with the Fund's exit of the investment. I oversee the technical training of Guardian's analyst and associates such as LBO modeling and data analytics. I enjoy teaching and developing our team, and recently have extended that to include teaching one of the ACGU classes.

What are you working on? I am currently working on two simultaneous add-on acquisitions for one of our portfolio companies, which I expect both to close by the end of April. Although Guardian acquires lower middle market companies that have organic growth opportunities, we also do leverage add-on acquisitions as a means of accelerating the strategic value creation for these companies.

What's on your mind? Over the past decades many industries have developed global supply chain without a lot of slack in the system. I'm interested in how supply chains will evolve to handle the next severe systemic shock. Also, with increased focus on Environmental, Social, and Governance best practices, I'm eager to see how this influences the behavior of business owners and deal opportunities over the next decade.



[Michael Lamm](#), Managing Partner

[Corporate Advisory Solutions](#)

mlamm@corpadvisorysolutions.com

ACG Philadelphia Membership & SaaS Deal Conference Committees

Tell us about your role / firm: I am a Co-Founder and Managing Partner of Corporate Advisory Solutions (CAS). We are a Philadelphia based, independent, investment and merchant banking firm that specializes in tech-enabled outsourced business services. We pride ourselves on working with people across the world to ensure the best collaborations for our clients.

Our core areas of focus are within the healthcare revenue cycle management, call center/contact center and accounts receivable management industries. Our team creates personalized solutions to help each client reach their business goals.

CAS was recognized by the Entrepreneurs Forum (Philadelphia 100) in 2020 as one of the fastest growing companies in the region. For more information about our firm, visit us at www.corpadvisorysolutions.com and you can follow us on LinkedIn <https://www.linkedin.com/company/3188588/admin/>

What are you looking for? We are always looking to connect with private equity, family offices, individual investors and lenders, as well as service providers who have an interest in tech-enabled outsourced business services.

What are your challenges? We are seeing more M&A opportunities internationally (Europe, Asia, South America), and with travel limitations, it has been harder to fully assess them. As a result, this has given us the ability to create new assessment (virtual) protocols for international situations to help to overcome these challenges.