



CapitalConnect

SOWELL
MANAGEMENT

EXPERT GUIDANCE EXCEPTIONAL RESULTS

Capital Connect brokered by eXp Commercial provides specialized advisory services to business owners and financial advisor clients nationwide. We offer expert guidance in business valuations, exit planning, M&A transactions, commercial real estate, asset liquidation, capital funding and life insurance. Our credentialed approach and in-depth understanding of numerous industries enables us to empower business owners and advisors to grow their ancillary services, optimize their client portfolios, and plan for a successful transition, ensuring continuity for their business and clients, and a secure financial future.



WHY PARTNER WITH US

HOLISTIC WEALTH MANAGEMENT

Most advisors focus on retirement planning, investments, insurance and tax efficiency. But for business owners their company often represents the largest asset they own. Partnering with M&A, exit planning and commercial real estate professionals ensures the advisor can help protect, grow and eventually transition that asset, rather than leaving a major part of the client's net worth unmanaged.

BUSINESS OWNERS NEED GUIDANCE ON SUCCESSION & EXIT STRATEGY

Advisors typically don't have this type of expertise, and by bringing in an M&A and exit planning partner, this allows advisors to support clients during one of the most critical financial events of their life.

COMMERCIAL REAL ESTATE INTEGRATION

For many business owners, real estate is tied up with their company, whether they own it, lease it, or consider property investment as part of their portfolio. Commercial real estate professionals help with valuation, sale, or acquisition of real estate tied to the business. This ensures business and personal financial plans are aligned (for example, deciding whether to sell the building with the business or hold it separately for income).

CLIENT RETENTION & DIFFERENTIATION

By providing access to specialized expertise under one umbrella, the financial advisor becomes the hub for all of the client's financial and business transition needs. This leads to i) stronger client loyalty (adviser seen as indispensable), ii) a competitive edge over advisors who only handle investments, and iii) opportunities to gain referrals as M&A and commercial real estate professionals often send clients back to the advisor for personal wealth management.

COORDINATED STRATEGY

Instead of clients piecing together advice from multiple unconnected professionals, a team-based approach ensures coordinated strategies regarding tax planning, investment planning and real estate decisions.

BOTTOM LINE

A financial advisor partnering with M&A, exit planning and commercial real estate experts deepens trust, expands services and ensures clients' biggest financial assets are managed with precision.

OUR SERVICES

- Mergers & Acquisitions
- Portfolio Analysis (Broker Opinion of Value)
 - Business Valuations
 - Real Estate Valuations
- Commercial Real Estate
- Certified Business Valuation
- Exit Planning
- Asset Liquidation / Short Sales
- Capital Funding

CREDENTIALS



CERTIFIED BUSINESS INTERMEDIARY

A Certified Business Intermediary is an experienced business broker who is committed to the highest level of professional development the industry has to offer and has ethical values aligned with the IBBA standards of professionalism. A CBI has the ability to objectively guide clients through the intricacies of the entire marketing and negotiation process of a business sale, resulting in successful transactions and satisfied clients. A CBI offers the most experienced professional representation available during the process of selling or buying a business. Along with having undergone a specialized initial program of detailed training, a CBI is required to earn continuing education credits to maintain the credential.



CERTIFIED COMMERCIAL INVESTMENT MEMBER

CCIM Designees are proven leaders in commercial real estate who care as much about the expertise, ethical responsibility, and quality of their service, as they do about the result. Individuals earn the CCIM Designation by: 1) Completing a rigorous program including an elite curriculum; 2) Demonstrating a depth of proven experience; 3) Exemplifying a commitment to ethics and deal-making.



CERTIFIED EXIT PLANNING ADVISOR

The Certified Exit Planning Advisor (CEPA®) credential is for professional advisors who want to effectively engage more business owners. Through the process of Exit Planning (the Value Acceleration Methodology™), owners can build more valuable companies, have stronger personal financial plans, and align their personal goals. Earning CEPA doesn't change your expertise, it enhances your ability to engage business owners and have value-added conversations around growth and exit.



CERTIFIED VALUATION ANALYST

The CVA designation is an indication to the business, professional, and legal communities that recipients have met the rigorous standards of professionalism, expertise, objectivity, and integrity in the field of business valuation, financial consulting and litigation, and related consulting disciplines. This CVA designation, established by the National Association of Certified Valuators and Analysts® (NACVA®), is the only valuation credential accredited by the National Commission for Certifying Agencies® (NCCA®), the accreditation body of the Institute for Credentialing Excellence™ (ICE™), and the ANSI National Accreditation Board® (ANAB®).

LEADERSHIP



SAM GRIFFIN, CBI, NACREP | PARTNER | M&A | COMMERCIAL BROKER

Sam is a seasoned M&A advisor, Certified Business Intermediary, business broker, and commercial real estate agent in all 50 states and 21 countries. As a trusted advisor in the business brokerage and real estate industry, Sam understands that every client's needs are unique. He has a passion for fostering relationships and for helping entrepreneurs and investors achieve their goals. Sam is known for his professionalism, integrity, and commitment to maintaining strict confidentiality throughout the transaction process.



MATT WILSON, CBI, CEPA | PARTNER | INVESTMENT ADVISOR | M&A | EXIT PLANNING | COMMERCIAL BROKER

Matt is a tenured Investment Advisor Representative, Certified Business Intermediary (CBI), Certified Exit Planning Advisor (CEPA®) and commercial real estate broker specializing in helping business owners and financial advisors' clients achieve their strategic goals. Matt brings a wealth of expertise in business valuations, exit planning, and M&A transactions. He's passionate about helping business owners and financial advisors navigate the complexities of valuing, go to market strategies, selling, or transitioning. Matt's goal is to provide tailored solutions that empower all involved parties achieve their strategic objectives.



MELANIE HOGGARD | COMMERCIAL BROKER

Melanie is a dedicated Business Broker & Commercial Advisor focused on helping business owners achieve their goals. Through her experience as a franchise owner/operator of multiple restaurant brands and a personal services business, she offers valuable expertise in operations, growth, and profitability. Having successfully navigated various business transactions, she understands the complexities involved and the significant value a broker brings. She is a trusted partner who works diligently to guide clients through the complex buying/selling process.



BRIANA BERG | NACVA CERTIFIED VALUATION ANALYST

Briana is a serial entrepreneur who has successfully run and exited her own companies. She is also a NACVA Certified Valuation Analyst (CVA). Since 2019, she has been working as a small business consultant, assisting CEOs and owner/operators in achieving their goals. With her expertise in entrepreneurship, business valuation, and consulting, it is her passion to help fellow business leaders maximize the value of their companies.



DIANNA GRAY | DIRECTOR OF OPERATIONS

Dianna is known for her efficiency, attention to detail, and commitment to excellence—qualities that ensure operations run seamlessly and allow agents to focus on serving clients and closing deals. With over 20 years of real estate experience and a proven track record in operational leadership, she has the expertise to support and manage our growing team and expanding business. Her career began in corporate administration, where she honed exceptional organizational, problem-solving, and communication skills in high-pressure environments. During her tenure at eXp Realty and eXp Commercial, Dianna built deep expertise in transaction management, contract compliance, administrative operations, commercial growth, and agent support.