

STATEMENT OF QUALIFICATIONS

STEVEN G. JACOBS

President and Shareholder

President and co-founder of BCC Advisers, Steve specializes in assisting shareholders and managers identify and accomplish business transfer, corporate finance, and business planning objectives. With over 40 years of experience in the financial services industry, structuring and negotiating transactions and advising companies on financial matters, he works with business owners in a variety of industries and markets worldwide.

OTHER PROFESSIONAL EXPERIENCE

- Bankers Trust Company, Des Moines, IA
Sr. Vice President/Metropolitan Banking
Vice President/Commercial Lending

EDUCATION, LICENSES, & CERTIFICATIONS

- M.B.A., Drake University
- B.S. Business Administration, Drake University
- Investment Banker Licenses (Series 62, 63, 79)
Registered Representative with StillPoint Capital, LLC
- Real Estate License, Broker-Officer – State of Iowa
- Real Estate License, Broker-Officer – State of Missouri
- Greater Des Moines Leadership Institute – Graduate

PROFESSIONAL & COMMUNITY INVOLVEMENT

- Alliance of International Corporate Advisors (AICA) – Member
- Iowa Association of Business and Industry (ABI) – Board Member
- Employers Mutual Casualty Company (EMC) – Board Member & Finance Committee chair
- Iowa Scottish Rite Masonic Foundation – President and Board Member
- Plains Angels – Member



Steve Jacobs

steve@bccadvisers.com
515.777.7077

- Mergers & acquisitions
 - Buy-side transactions
 - Sell-side transactions
 - Succession planning
 - Recapitalization
 - Cross-border transactions

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PROFESSIONAL & COMMUNITY INVOLVEMENT, CONTINUED

- Rotary Club of Des Moines – Member, Past Foundation Committee Chair
- Plymouth Congregational Church – Stewardship Board Member; Past Moderator and Chair of Trustees
- Century Investment Club – Member, Past President
- Reciprocity Breakfast Club – Member, Past President
- Druid Hill Homeowners Association – Co-chair of Grounds Committee

PRESENTATIONS & ARTICLES

- “M&A Update” panel participant for Greater Des Moines Committee Luncheon, Des Moines, Iowa – May 16, 2023.
- “CEO Survey” contributor in **ABI Business Monthly** (published in *Corridor Business Journal* and *Quad Cities Business Journal*) – June 2023 issue.
- “Update on Mergers & Acquisitions” presented to **Reciprocity Breakfast Club**, Des Moines, Iowa – October 13, 2021.
- “Overview of global and Iowa M&A” published in **ABI’s The Voice of Iowa Business**, December 13, 2019.
- “Mid-Year Outlook - Plans, Priorities & Expectations in the Public & Private Marketplace” panel participant at **Gilbert & Cook**, West Des Moines, Iowa – July 18, 2019.
- “Impact of New Trade Policies on Global M&A” panel participant at **Faegre Baker Daniels 2018 Iowa M&A Conference**, Des Moines, Iowa – September 6, 2018.
- “Generational Succession” panel moderator at **ABI - Connecting Statewide Leaders**, Okoboji, Iowa – August 2, 2018.
- “Capital Markets Overview, Buy-side M&A, Sell-side M&A” presented at **ABI CFO Roundtable**, Des Moines, Iowa – September 7, 2016.
- “What’s the outlook for merger and acquisition activity for Iowa companies?” published in the **Business Record (2017 Economic Forecast)**, January 27, 2017.
- “Insights on Deal Execution and Related Issues” presented at **Faegre Baker Daniels 2015 Iowa M&A Conference**, Des Moines, Iowa – August 6, 2015.
- “Exit Strategies” co-presented at the **ABI Annual Conference**, Cedar Rapids, Iowa – June 10, 2014.