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10-Phase Blueprint: The Path to IPO

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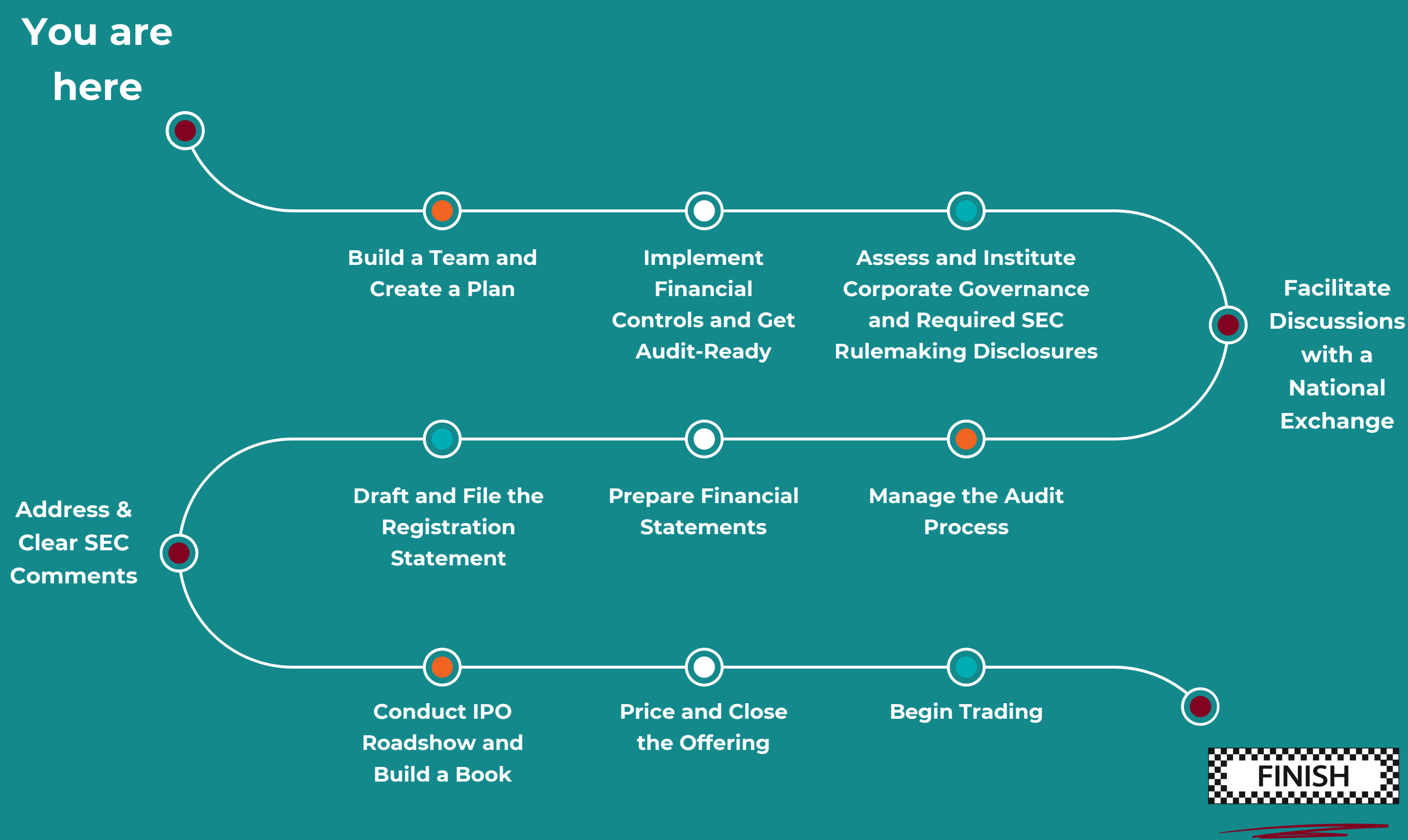
IPO plans?

The Initial Public Offering (IPO) is often considered the ultimate financial achievement in the capital markets. With an IPO comes prestige, access to capital, and greater liquidity for shareholders.

However, an IPO also brings significant responsibility to a company's management and board of directors. The IPO process is complex, requires significant financial reporting, imposes regulatory burden, and is reliant on extensive collaboration – both inside and outside a company's control. It's really the beginning of a new financial journey into the capital markets for a company (Issuer) and all of its stakeholders.



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Use our 10-Phase Blueprint to guide your IPO journey.

EVERYTHING IN RED IS YOUR RESPONSIBILITY AS THE ISSUER. ALTERNATIVELY, EVERYTHING IN RED IS WHAT WE'RE HERE FOR:

You can hand off all aspects of the finance, accounting, reporting, compliance, and strategic CFO advisory (both pre- and post-IPO) to Eventus and know it's in good hands.

COLOR CODE:

- Issuer (Company) or Eventus on behalf of Issuer
- Securities Counsel
- Underwriter
- Other (Auditor, Financial Printer, Transfer Agent, Investor Relations)

1. Build A Team and Create A Plan

Help build the external team of key primary collaborating partners (Securities Counsel, Underwriter and Auditor).

Identify additional key partners (Investor Relations Firm, Transfer Agent and Financial Printer).

In conjunction with key primary collaborating partners, determine target date(s) for IPO, identify limiting factors, build a timeline, and delineate roles and responsibilities. This should be done in collaboration with the Underwriter and Securities Counsel.

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Securities Counsel

Underwriter

Other (Auditor, Financial Printer, Transfer Agent, Investor Relations)

2. Implement Financial Controls and Get Audit-Ready

Build internal processes so that proper financial controls are in place and the Issuer is prepared for an audit.

Implement accounting controls and support the Issuer on timely monthly close processes, assess and implement internal controls/SOX readiness, prepare financial schedules/workpapers, provide technical analysis and technical support for material accounting issues and prepare a financial statement package, including financial statements and footnotes, for auditor review.

COLOR CODE:

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Securities Counsel

Underwriter

Other (Auditor, Financial Printer, Transfer Agent, Investor Relations)

3. Assess and Institute Corporate Governance and Required Securities and Exchanges Commission (SEC) Rulemaking Disclosures

Advise and design a corporate governance plan.

This plan provides guidance and creates the processes for the Issuer to meet both the quantitative and qualitative requirements of the SEC and National Exchanges for all governing committees (i.e. audit, compensation, nominating/corporate governance), adoption of code of ethics/conduct, governance and insider trading policies, requisite shareholder approvals, officer certifications, etc.

Guide, assess timing, and draft disclosure requirements for SEC rulemaking compliance. Assist Securities Counsel on drafting a corporate governance plan, including audit committee self-assessment and preparation.

The Auditor will review SEC rulemaking disclosures for accuracy and completeness.

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4. Facilitate Discussions with a National Exchange

Select a National Exchange.

In collaboration with Underwriter, initiate and lead discussions with most suitable National Exchange.

Complete, file, and monitor application process and manage discussions and respond to comments from selected National Exchange toward final approval, pending IPO pricing.

Provide assistance in the application and approval process for financial calculations and discussions, including (where applicable) burn rate, shareholder equity, dilution, and capitalization analysis.

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Securities Counsel

Underwriter

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5. Manage the Audit Process

The Auditor will plan and lead a timely audit process with due reliance on the Issuer for timely provision of all audit request items.

Provide leadership to the Issuer to meet the audit timeline via interface with the Auditor on audit request items, providing financial schedules, transaction support, and technical analysis of material accounting issues.

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6. Prepare Financial Statements

Prepare financial statement package, including financial statements and footnotes for the requisite audit periods, as well as any interim financial statements that will be required during the course of the registration statement process toward final effectiveness.

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Underwriter

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7. Draft and File the Registration Statement

Lead the registration statement process with the SEC and in the drafting of the disclosures and content of the registration statement.

Support the process by leading the financial sections, including the financial statements, MD&A, and dilution and capitalization calculations and schedules.

Guide Securities Counsel on the structure of the offering.

The Financial Printer will prepare the document for filing with the SEC.

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8. Address and Clear SEC Comments

Manage the registration statement process with the SEC.

Maintain version control of the document and delegate SEC comment responses to appropriate parties including legal comments, including tracking responses, drafting comment response letter, and coordinate with the Financial Printer toward timely filing of registration statement amendment(s).

Provide responses and disclosures to address financial comments from the SEC in collaboration with Underwriter.

The Financial Printer will provide at-the-ready amendments and redlines of registration statement toward filing resubmission with the SEC.

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9. Conduct IPO Roadshow and Build a Book

Manage the Issuer roadshow and communicate with potential investors.

Conduct discussions with investors, build a book by gauging appetite for structure of offering, tracking commitments, determining the final price for the IPO based on orders received, and allocating shares to investors based on demand.

Monitor Issuer compliance through roadshow process.

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10. Price and Close the Offering and Begin Trading

Lead final pricing and timing of IPO.

Close the book, coordinate final questions and comments from National Exchange for final book and approval of pricing and timing, confirm final pricing and timing of IPO/trading date and collect and escrow funds to be prepared for release to the Issuer.

Prepare final prospectus and other required SEC filings.

Support SEC Counsel with additional financial disclosures as part of final prospectus.

The Financial Printer will prepare final prospectus and SEC documents for filing with the SEC.

The Transfer Agent will record shareholder transactions, issue certificates and process investor mailings.

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Congratulations!

BEYOND THE 10 PHASES:

After the IPO is closed, Eventus can help the Issuer continue to efficiently handle all its SEC compliance, financial reporting ('34 Act Filings), and build out the firm's financial controls and other internal financial processes as the business scales.

Additionally, the Auditor will perform an annual audit and quarterly reviews of financial statements. Securities Counsel will review annual and quarterly (or semi-annual, as applicable) SEC filings for accurate disclosures and adherence to SEC standards, as well as provide legal support for the Issuer on all securities matters.

Lastly, the Underwriter will manage future capital offerings and investors, while Investor Relations will serve as primary liaison to communicate the Issuer's message to the investment community.

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Ready for your IPO?

KEEP THIS BLUEPRINT HANDY ON YOUR JOURNEY OR GET IN TOUCH WITH EVENTUS NOW TO GET STARTED WITH A PARTNER AS DEDICATED TO YOUR SUCCESS AND GROWTH AS YOU ARE.

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