

Investing in a Private Company ©

Objective: Investing in a private company can produce very high returns which makes it attractive to many. This course will address the different ways investors can invest in private equity. It will explain how investing in private equity is different than investing in the public markets. The instructor will highlight numerous pitfalls that should be avoided.

Learning objectives:

- Note the different ways to invest in private companies
- Identify the factors to consider in selecting a private equity fund
- List the differences between LBO, venture capital, and hedge funds
- Explain the critical issues to consider before investing directly in a private company
- Describe various ways to structure a direct investment in a private company
- Describe the advantages and disadvantages of each option
- Note how CPAs can help their private business clients attract investors
- State how CPAs can help their clients evaluate the potential investor
- Explain how an investment in a private company should be documented
- Note the pitfalls to avoid

CPE: 4 or 8 hours

Level: Basic to Intermediate

Category: Technical Consulting

Prerequisites: None

Instructor: Dennis J. Gerschick

Code: IIPC