



EXECUTIVE LEADERS RADIO



Joe Statter, President
Evergreen Advisors

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Joe Statter has a unique understanding and acumen for business. His profile demonstrates his unique ability to grow business from the ground up. Joe has a keen eye for targeting clients and ensuring success in transactions that take place under his belt.

Joe is President of Evergreen Advisors Capital and oversees the Northern Virginia Office of Evergreen Advisors in Tysons Corner. Over the course of Joe's 27-year career in principal investing, financial management, public accounting, and investment banking, he has executed a broad spectrum of transactions including: private placements of debt and equity, mergers and acquisitions, convertible and high yield debt, IPOs and follow on equity offerings, and restructuring/bankruptcy advisory engagements. His expertise spans multiple industries, transaction types, and stages of company development. Over the past 15 years, Joe has been focused on advising high growth companies across the converging value chains of the communications and media industries.

What does the company do for its customers:

Evergreen Advisors help companies raise capital and organize deal structures, as well as assist emerging growth companies access capital. Evergreen also provides assistance to large companies in order to successfully monetize their business. Each client is assigned a specialization team to assist in their transaction(s).

Who are the company's customers:

Evergreen Advisors customers have a focus in technology media and telecommunication. The companies are private companies with a \$10MM to \$100MM value.

Why don't the company's customers use a competitor:

When working with Evergreen Advisors, customers choose not to work with a competitor as they receive senior management level attention. Evergreen Advisors is top heavy with a full engagement team on each assignment. In doing so, this provides each client with a hand-picked, specialized team, tailored to their particular needs.

How did the CEO get involved:

Joe was hired in 2011 by Evergreen Advisors to provide a Metro DC presence. He started in Columbia, MD, as a managing director in order to build the investment banking division for the business. During this time Evergreen was not a broker dealer, instead they hired this piece out to a 3rd party paying them a percentage of the fees earned. In March 2015, Evergreen expanded into the broker dealer business becoming Evergreen Advisors Capital, a subsidiary of Evergreen Advisors. Joe now heads the investment banking and valuation group.

Learn from growing up and how it applies to the success today:

Joe's Dad was a pharmacist in downtown Baltimore, MD. Joe worked with his Dad from the age of 12 until 18. Over the years Joe learned to do all the jobs at his Dad's pharmacy. He stated that his real education came from working at his Dad's store. Joe initially wanted to become an accountant, but later realized his passion would lie in successfully creating deals leading him to Capital Advisors.

Brothers and Sisters / Pecking Order:

Joe grew up in Baltimore with 2 older sisters, whom had a nurturing impact on him. Both sisters were very motherly to Joe and he frequently jokes that he felt like he had 3 mothers growing up.

Effect on Business Success:

Joe learned empathy and respect from his sisters. These are traits he uses in business today.

Dad's Career:

Joe's Dad was a pharmacist in downtown Baltimore, MD. Joe worked with his Dad from the age of 12 until 18. Joe's Dad taught him how to run a business by training him in all areas of his pharmacy business. Joe's Dad also hired his father and funded his 401K for him. Joe feels his real education came from working with his Dad in his store.

Mom's Career:

Mom is a housewife until Joe was 13 when she began a career in the medical field. She taught Joe about loyalty and support of the ones you love and those around you.

Learn from Mom and How It Applies to Your Success Today:

Joe learned respect from his sisters and mother. They taught him to respect those around him and they will in-turn respect you. They also taught him the value of hard work. If you work hard for things you want, it will pay off. Mom taught Joe the power of being polite. She also taught him loyalty and support, this she showed Joe and his sisters through supporting their Dad and her husband. His mom also showed support of Joe by attending all of his games during his sports playing years.

Learn from Dad and How It Applies to Your Success Today:

Joe started working with his dad at the age of 12. Joe learned the value of hard work as well from his dad while working in his pharmacy in downtown Baltimore. Over the years, Joe learned how to do each job in the Pharmacy, making him a valuable resource. Joe's Dad and sister also taught him the value of being an "Under Dog". They explained that as the "Under Dog" you have to work harder and smarter to reach your success level.

Interviewed by:

Andrew Lewis, CIMA®, AAMS
Managing Director
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