



# Co-Investing, Club Deals and Direct Investing

*Private Equity Webinar Series*



*By Richard C. Wilson*



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# Our Featured Guest



**Julia D. Corelli** is a partner with Pepper Hamilton LLP and vice chair of the firm's Executive Committee. She also co-chairs the firm's Commercial Department and its Funds Services Group.

Ms. Corelli concentrates in private investment fund formation, private equity investment transactions, venture capital investments, acquisitions and dispositions of business enterprises, joint ventures, and corporate/shareholder and partner/partner dealings. She also is experienced in matters of investment fund principal compensation and planning.

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# Co-Investing Insights



1. Can you help us define co-investments and club investments and the difference between them?
2. What are the different common forms of co-investments?
3. Challenges for family offices making co-investments?
4. What are important factors that affect the success or failure of a co-investment?
5. What are the most important terms to negotiate in a co-investment deal?



# Club Deals

1. How are the roles, responsibilities and profits divided among club deal partners?
2. What types of legal entities are used in most club deals, and how does this differ from co-investing?
3. Some families have found club deals to be challenging, how often do you see family offices participating in these?
4. Considerations when deciding whether a co-investment, direct investment or club deal is the best route?



# Protecting Your Interest

1. How can a GP protect its deal when sharing the details with potential co-investors and direct investing partners?
2. How can any investor protect itself from being carved out of the deal?
3. How can co-investors help improve the chances that a deal will be executed without drama, lawsuits or similar difficulties?





# Questions?



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