

IR CONSULT

Since 1994, IR CONSULT has been a successful corporate consultant for capital market issues (M&A, VC, PE, etc.), listing of companies (IPO, ICO and corporate bonds) as well as fundamental investor relations, i. e. absolutely targeted information (fact-book, equity story, presentation, online IR, etc.) for domestic and foreign investors.

Our consulting portfolio is rounded off by efficient financial communication, international co-operations and active participation in various capital market networks.

The IRC team is proud to have broad experience from nearly 100 IPOs and over 100 IR projects.

Numerous and long-standing mandates of well-known stock listed companies underline our successful and clearly focused consulting approach with an optimal price-benefit ratio.

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SUCCESSFUL ICO REALIZATION

An Initial Coin Offering (ICO) or Initial Token Offering (ITO) is a revolutionary way of raising capital for companies.

Especially for start-ups and small and medium-sized enterprises (SMEs), an ICO can solve the financing problem, as the whole capital raising process is quick, easy and very cost-effective.

IR CONSULT now also advises start-ups and SMEs on their ICO preparations and follow-up activities. Our many years of capital market know-how as well as our well-established contacts to the international financial world are the decisive keys to your successful ICO.

Contact: post@ir-consult.de or phone +49 - 6002 - 92042.

EASILY RAISING CAPITAL VIA AN ICO

In the case of an ICO, a company issues coins or tokens either itself or via an ICO exchange instead of own shares (IPO) or equity (VC). Interested investors can purchase them - mostly paid with a digital currency (bitcoin, ether or similar). The technical settlement as well as booking on the account of the investor (wallet) is mostly done with the blockchain technology. That is why market speaks of a ‚digital share‘.

It is **advisable** to conduct an ICO with an ICO exchange, which not only helps with issuing, but also enables a regular, transparent and cost-effective secondary trading for the coins. In addition, such ICO exchanges have established access to interested investors worldwide, making the placement of tokens faster and more successful.

The **money raised** then flows directly to the company and can be used for the planned future and growth investments. It's mostly a kind of hybrid capital without voting rights which is attributed to equity and very flexible as far as the contract clauses are concerned. In contrast to crowdfunding, which is often realized via a subordinated loan, which therefore has to be repaid, the **ICO capital is available to the company over the long term.**

The **ICO investors** either receive certain advantages from the company, such as vouchers or similar, or even a kind of profit-dependent dividend. That is why we also speak of **reward, utility or equity tokens**. But more important for them are the expected **price increases of the coins.**



AN ICO OPENS SIGNIFICANT ADVANTAGES FOR COMPANIES

ADVANTAGES

- ◆ fast and cost-effective capital raising for start-ups and SMEs
- ◆ via ICO platform even worldwide and for all investor types
- ◆ also suitable for larger amounts
- ◆ no approval and regulation
- ◆ only a few documents needed
- ◆ long-term capital
- ◆ no voting rights, as mostly hybrid capital (equity similar)
- ◆ company determines the rights of the coin/token owner
- ◆ without any collateral
- ◆ awareness and publicity is increased
- ◆ ICO funds in planning
- ◆ facilitates follow-up issues (even up to an IPO)

DISADVANTAGES

- ◆ no placement guarantee
- ◆ no regulated public offer
- ◆ placement of tokens within a fixed period of time (usually 30 days)
- ◆ more public transparency through company documents
- ◆ possibly more regulation of ICOs
- ◆ ICOs could even be banned



NECESSARY DOCUMENTS:

The following documents and information about the company/project are necessary for the issue of coins or tokens, which have turned out to be common and helpful in practice:

- ◆ meaningful website with a part for investors
- ◆ videos and photos to explain the desired projects
- ◆ product brochures etc.
- ◆ ‚white-paper‘: This is a kind of a business plan with details about the company, the team, the current business, the future projects, their funding as well as the expected corporate development.
- ◆ possibly further ‚special papers‘ on technology, patents, legal matters etc.
- ◆ ‚term sheet‘, i. e. details about the number of issued coins, the term of the issue, road-map, the rights of the buyer and possible risks



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ICO CONSULTING OF IR CONSULT WITH CRUCIAL ADVANTAGES



The creation of the company information necessary for an ICO is possible in **1 to 2 months**. It is good that the company can also use many of these documents for other purposes, such as loans, partnerships, marketing, etc.

But despite the small amount of documentation required for an ICO the creation **needs capital market know-how, experience and contacts.**



IR CONSULT, the only provider of integrated IPO consulting (www.ipo-advisor.com), assists our ICO clients as follows:

- ◆ optional: capital market check (www.boersenreif.com)
- ◆ decision-making pro / contra ICO
- ◆ project management, placing key data
- ◆ choice of the appropriate token type
- ◆ business valuation, investment case
- ◆ consulting of all necessary documents
- ◆ finding the best ICO platform
- ◆ supporting PR, Q&A
- ◆ initiate ICO marketing (external)
- ◆ establishment of investor relations
- ◆ IR contact during the placing



Your company benefits from IR CONSULT

- ◆ many years of capital market know-how
- ◆ established investor network
- ◆ faster realization of your ICO
- ◆ improved placement chances
- ◆ more time for management for the operational business