



THE RISE OF KONTAKTSOURCE: THROUGH THE GLOBAL PANDEMIC

2020-2021



KONTAKTSOURCE

www.kontaktsource.com

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ABOUT KONTAKTSOURCE



Founder: Marianne Halvorsen

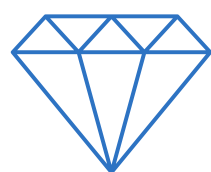
Marianne Halvorsen is an award-winning merger & acquisition insurance advisor, teacher and thought leader, who is driven to deliver exceptional client services. She is a strategic client advocate with extensive business development skills and global markets expertise, providing property & casualty, employee benefits, and risk management insurance solutions to clients throughout the northeastern United States. Marianne has achieved two masters of business degrees since leaving Norway in 1999, rising quickly through the ranks of insurance brokerage and building a successful book of business in the competitive New York City insurance market.



KONTAKTSOURCE



Situated in a warm, inviting loft in the heart of the South Street Seaport, New York, we host unique events supporting deal flow and new business.



All events, both virtual and in-person, have a unique touch, creating an environment that generates new thinking, creative ideas, and valuable connections.



By strategically matching Private Equity Firms, Investment Banks, Independent Sponsors, Family Offices, Lenders and companies, Kontaktsource connects to effectively streamline the deal flow process.

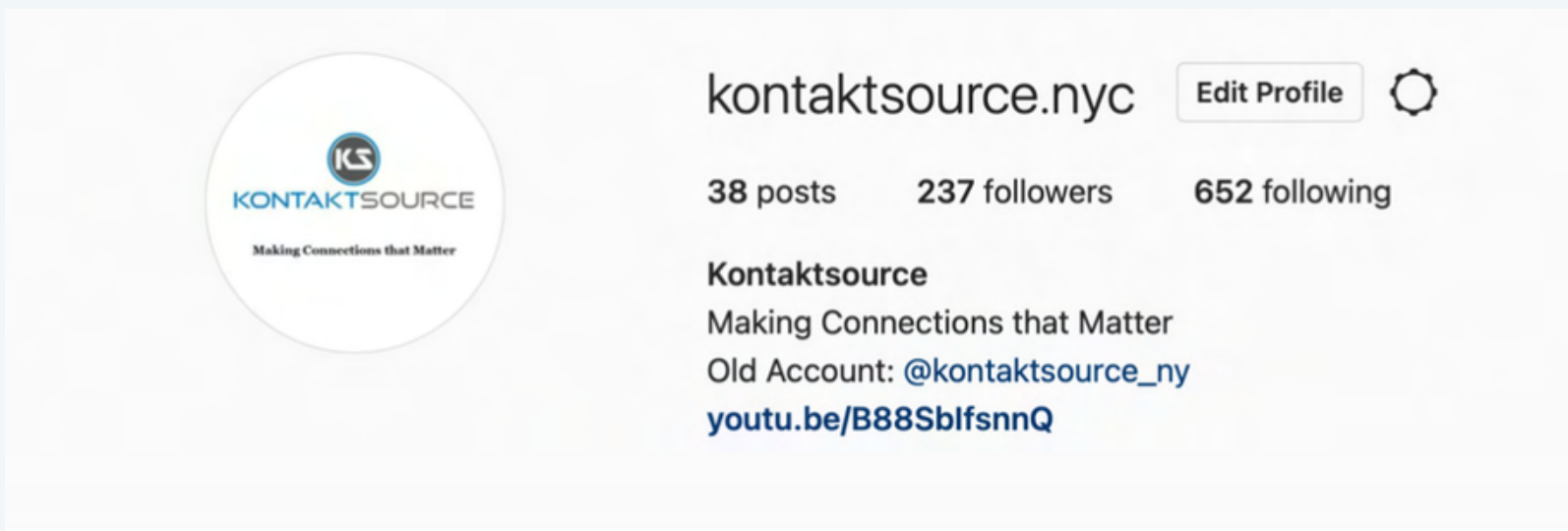


The intimacy of our events is what drives our mission. Join us on one of our upcoming events: “Deal Source Receptions” for early evening connections and virtual “Kontakt over Kaffe” mornings to start your day. We would love to make the connection.

Social Media: GROWTH & ENGAGEMENT

1

Instagram

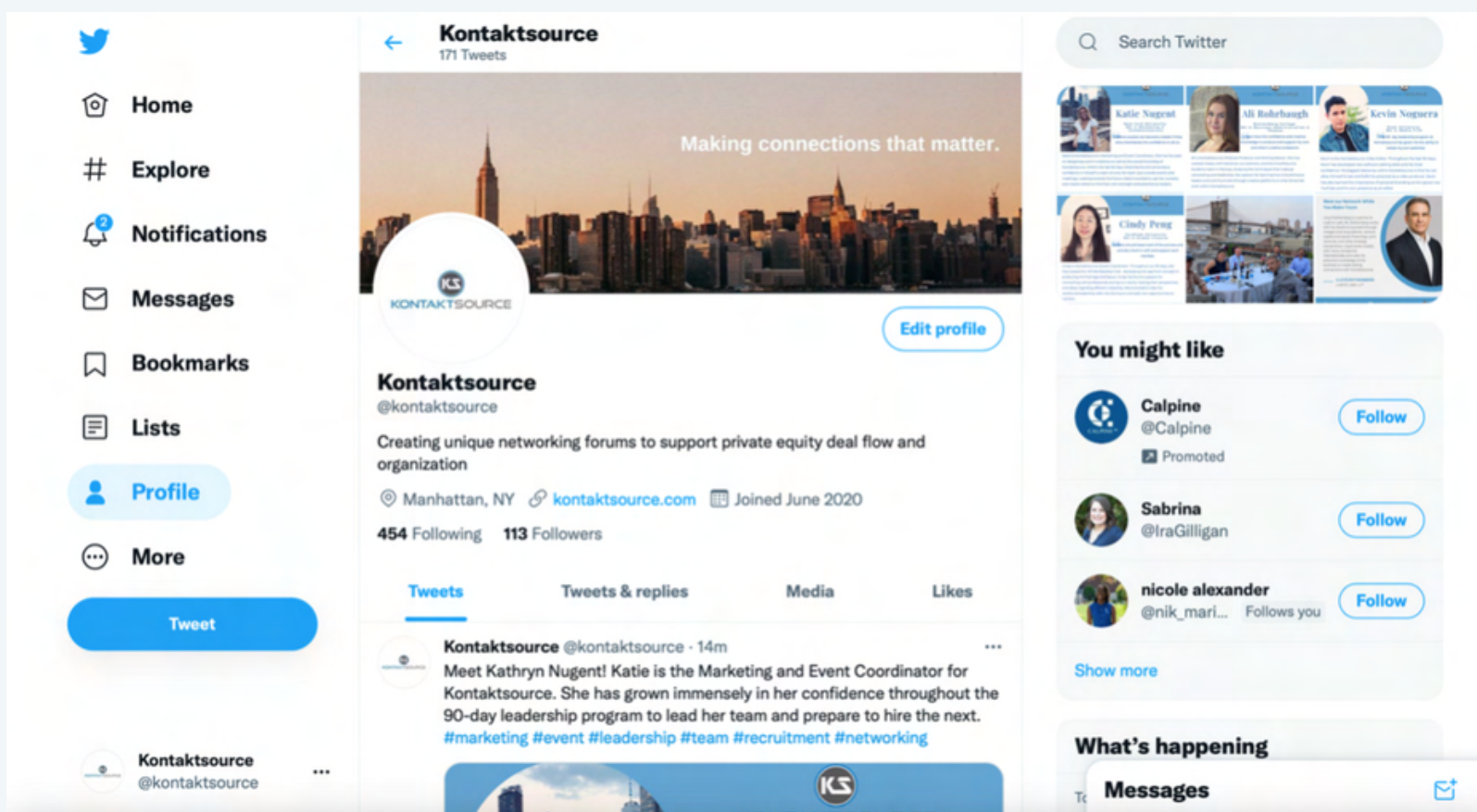


1

Instagram increased from 150 followers to 275 followers.

2

Twitter

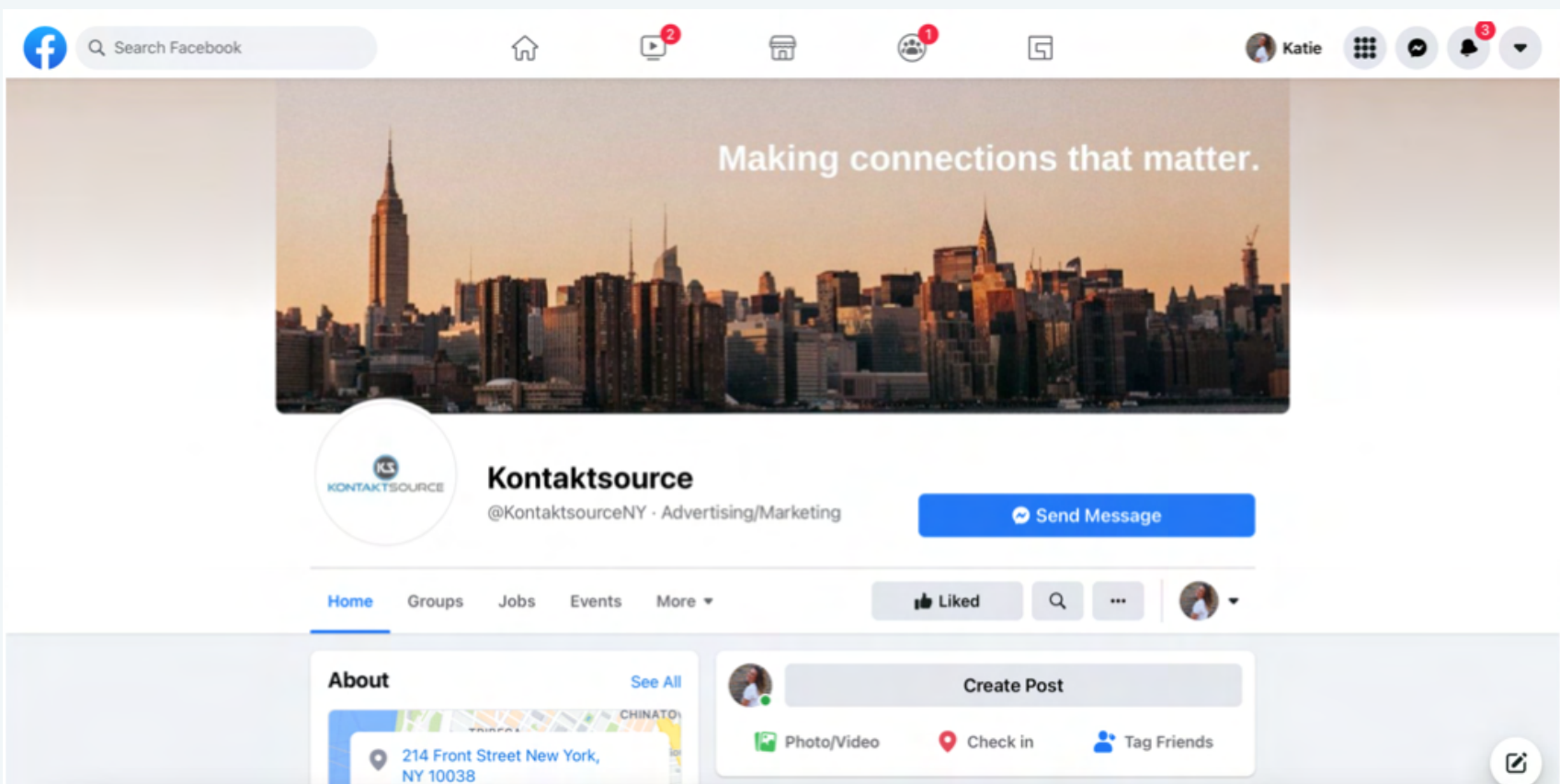


2

Twitter increased from 38 followers to 131 followers.

3

Facebook



3

Facebook increased from 174 page likes to 469 likes.

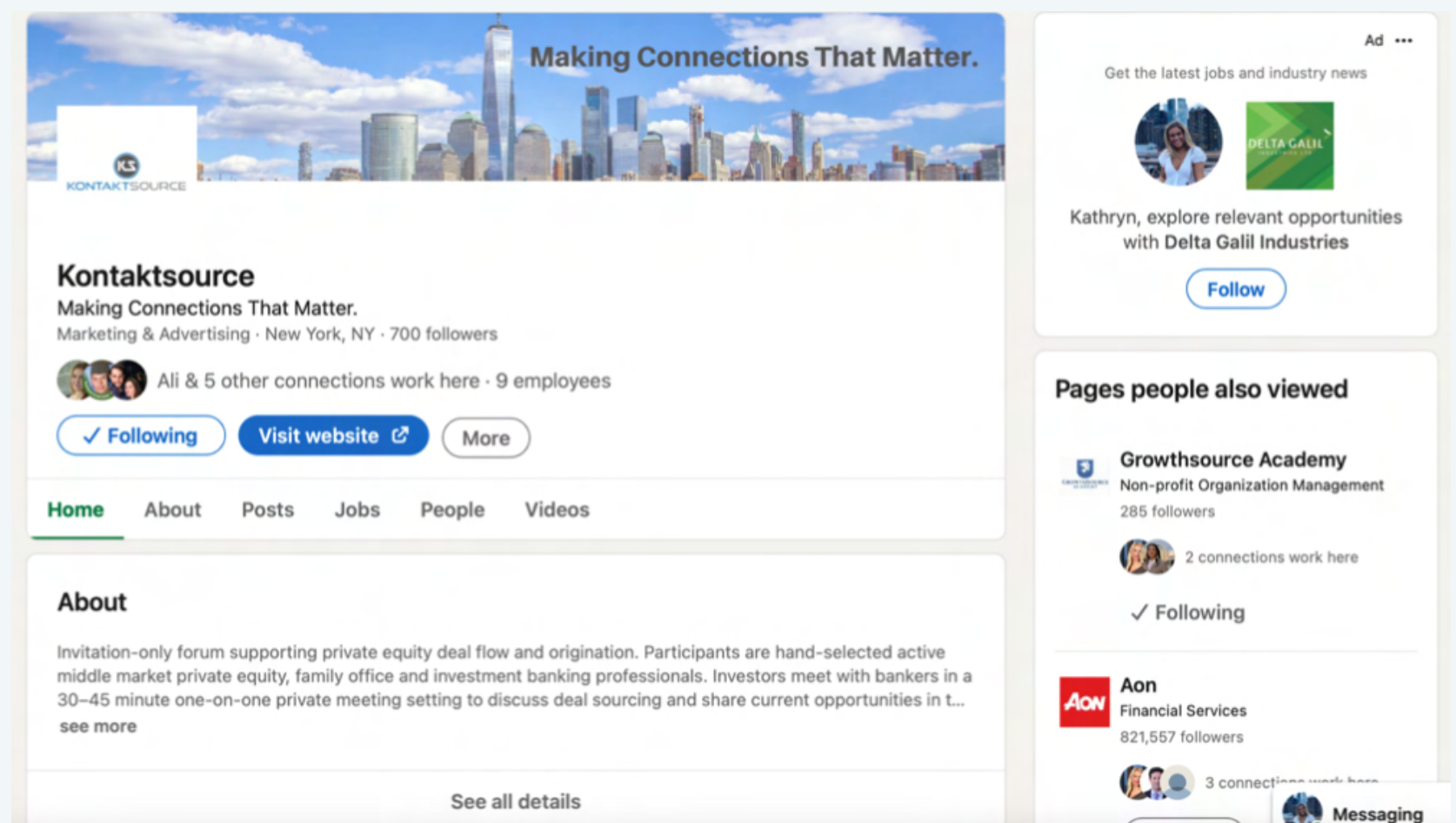
SOCIAL MEDIA: GROWTH & ENGAGEMENT

4

LinkedIn increased from 431 followers to 746 followers.

4

LinkedIn

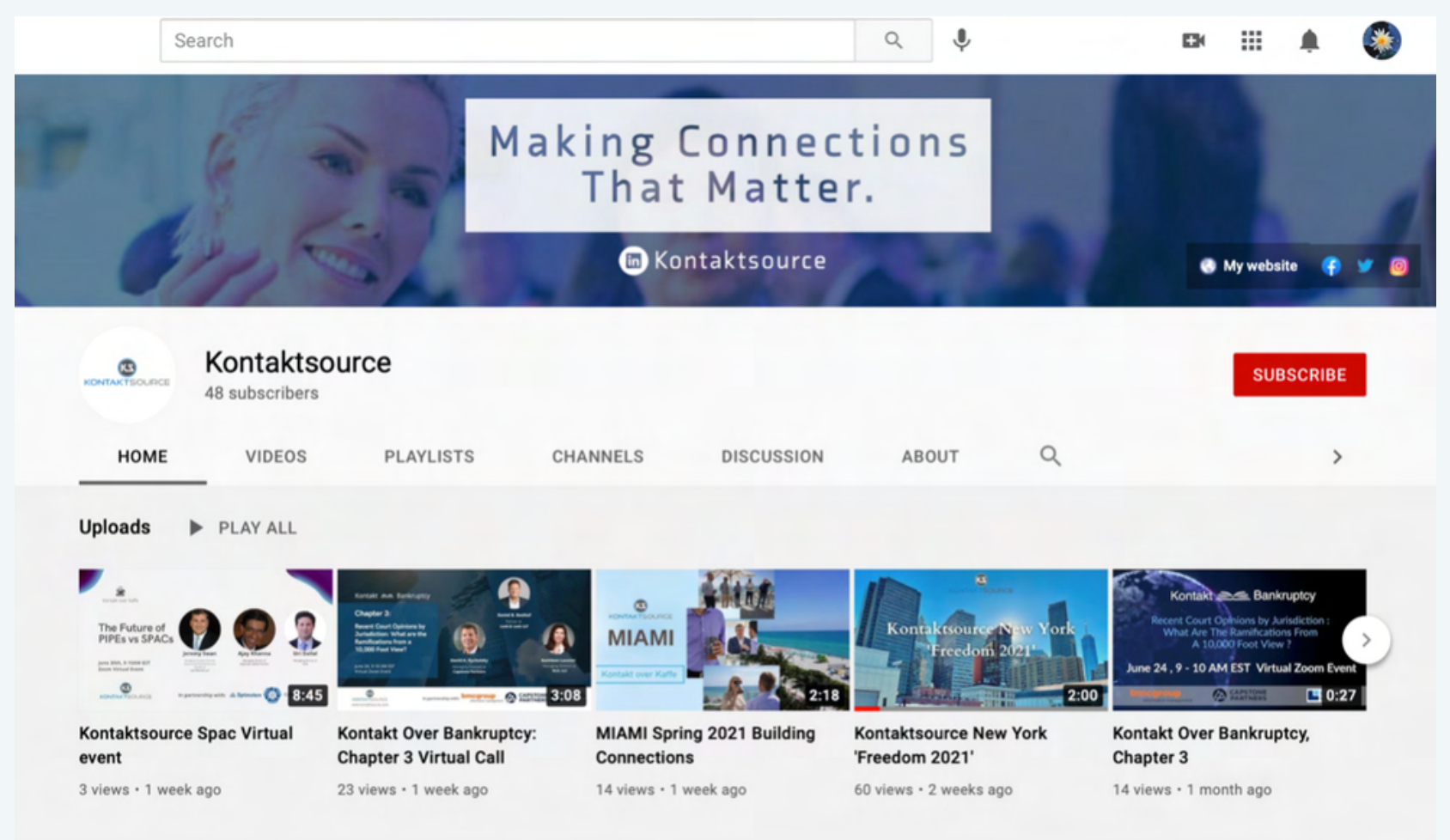


5

YouTube increased from 0 subscribers to 69 subscribers.

5

YouTube

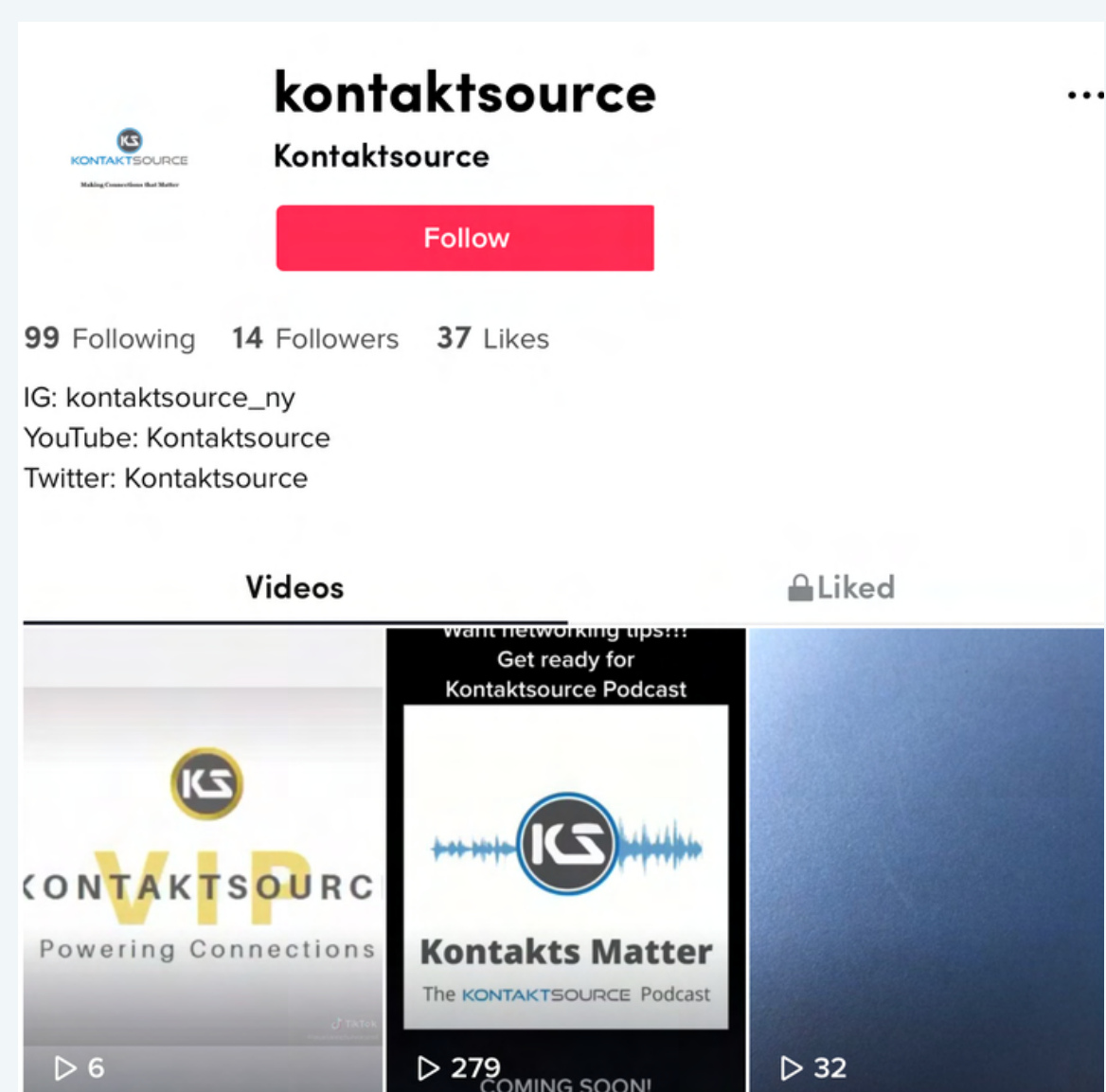


1

TikTok gained 24 followers after being created in May 2021.

6

TikTok



OUR EVENTS


VIRTUAL EVENTS

Kontakt ☕ Kaffe

Private equity and investment banking professionals discuss their takes on current topics within the market, answering questions and providing financial advice. All events take place Wednesdays from 9am-10am.


Kontakt 📖 Bankruptcy

Kontaktsource Bankruptcy brings small groups of professionals together for cross-pollination and discussion with networking in a format robust way to share informally on meaningful topics over Kaffe. Our new series Kontakt over Bankruptcy of 11 themed "chapters" launches virtually in March 2021 and will culminate in in-person gatherings when and where possible.



Kontakt over Kaffe

Talent and Talent Assessment in the Age of COVID


March 3rd, 9-10AM EST
Zoom Virtual Event




Ernie Paskey
Partner, Chief Regional Officer at Aon's North America Assessment Solutions





Cheryl Edwards, MSW, PhD
Executive Client Optimization Officer at Optimatum Solution



Mike Prutting
Chief Human Resource Officer Formerly with Fujifilm Holdings America

 **KONTAKTSOURCE**

In partnership with:  **Optimatum** 

Kontakt 📖 Bankruptcy

Chapter 3:

Recent Court Opinions by Jurisdiction: What are the Ramifications from a 10,000 Foot View?

June 24, 9-10 AM EST
Virtual Zoom Event



Daniel B. Besikof
Partner at Loeb & Loeb LLP



David A. Rychalsky
Managing Director at Capstone Partners



Kathleen Lauster
Managing Director at DLA, LLC

 **KONTAKTSOURCE**
www.kontaktsource.com

In partnership with:  **bmcgroup** information management  **CAPSTONE PARTNERS**  **LOEB & LOEB LLP**


Kontakt over Kaffe

How Can Private Equity Make Themselves More Attractive to Entrepreneurs Within the TMT Vertical

April 21st, 9-10AM EST
Zoom Virtual Event



Reed Philips
Managing Partner at Oaklins DeSilva+Phillips



Jeffrey Michelson
Partner at CohnReznick



Ajay Khanna
Managing Director at Daybreak Capital Partners




Lloyd Rothenberg
Partner at Loeb & Loeb

 **KONTAKTSOURCE**
www.kontaktsource.com

In partnership with:  **CohnReznick**  **Optimatum**  **LOEB & LOEB LLP**

THANK YOU KONTAKTSOURCE
2020 speakers



OUR EVENTS

IN-PERSON EVENTS

Kontaktsource Miami

We hold our Miami In Person Events on April and July to expand your network even further.



Kontaktsource New York

In person events in an intimate loft-space to elevate your financial connections.



Kontaktsource Miami



There have been 4 in-person Miami events with more to come. The latest event happened in July 2021 for Kontakt Over Kaffe Miami and Making Connections that Matter.

Kontaktsource New York



Kontaktsource has held nine in-person events at the New York City location, and plans to hold more in-person networking events in the future.

OUR PARTNERS & SPONSORS

OUR PARTNERS

PLATZER, SWERGOLD, LEVINE,
GOLDBERG, KATZ & JASLOW, LLP

CohnReznick 

 **WHITE OAK**
GLOBAL ADVISORS




**Tannenbaum Helpern
Syracuse & Hirschtritt** LLP

OUR EVENT SPONSORS



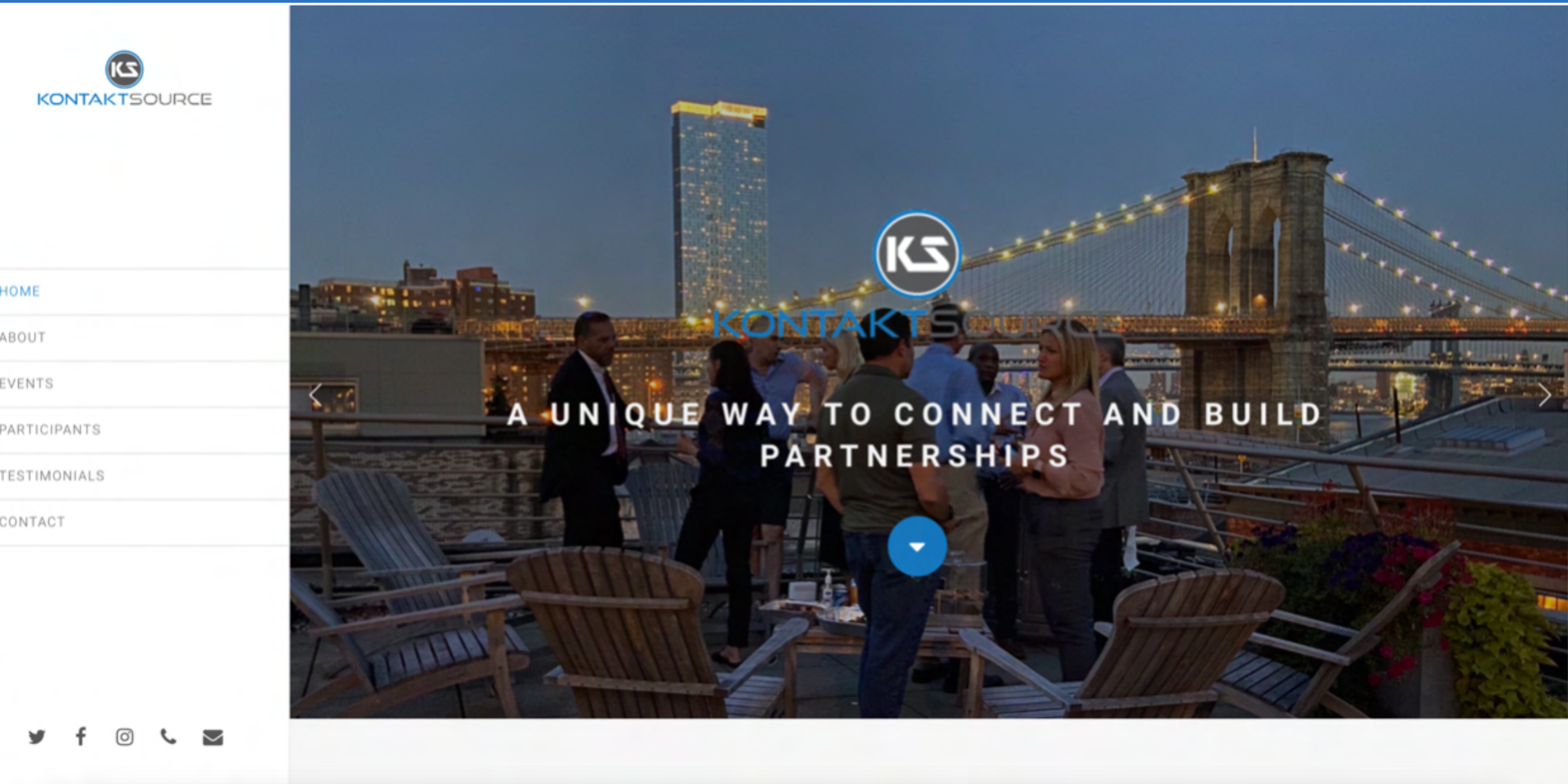
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bmcgroup

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KONTAKTSOURCE USA WEBSITE



KONTAKTSOURCE ASIA WEBSITE



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<https://en.kontaktsource-asia.org>

KONTAKTSOURCE ONLINE KAFFE SHOP

Kontaktsource Kaffe provides customers with premium coffee beans, K-cups, travel mugs, and more, available for purchase.



KONTAKTSOURCE
KONTAKT KAFFE
Making Connections That Matter



Breakfast Blend - 12oz Ground Coffee
\$14.99

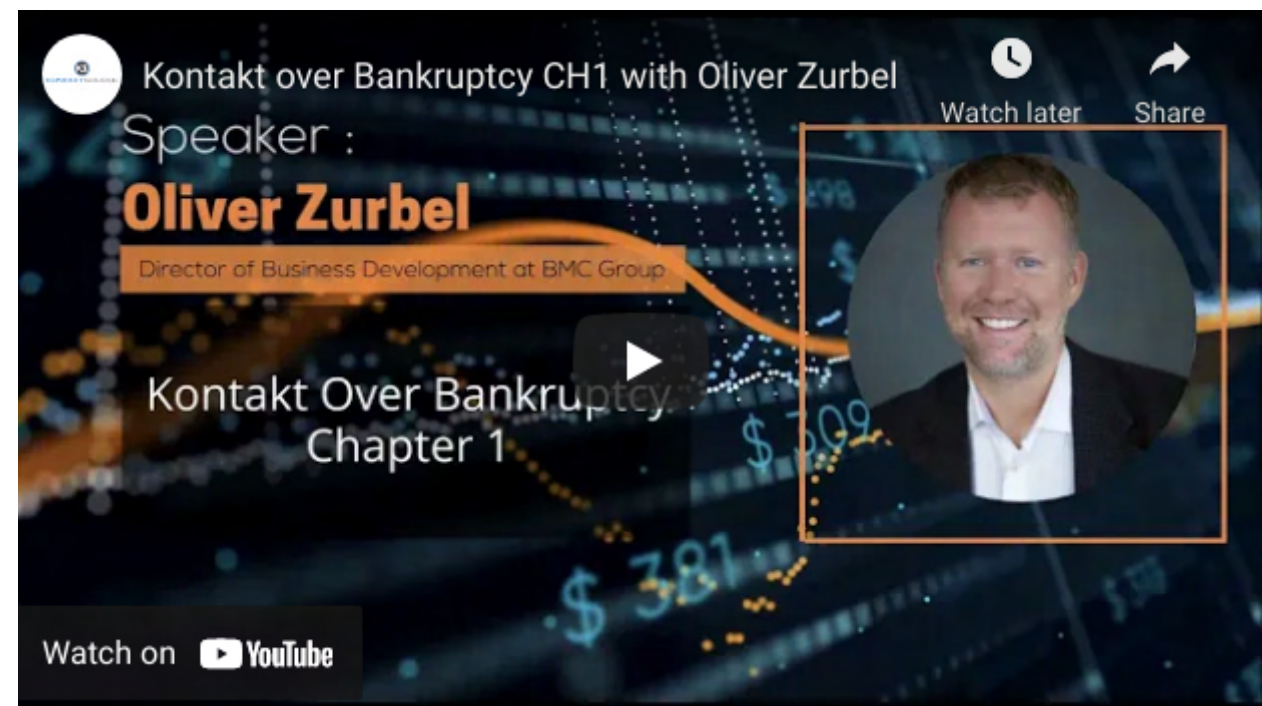
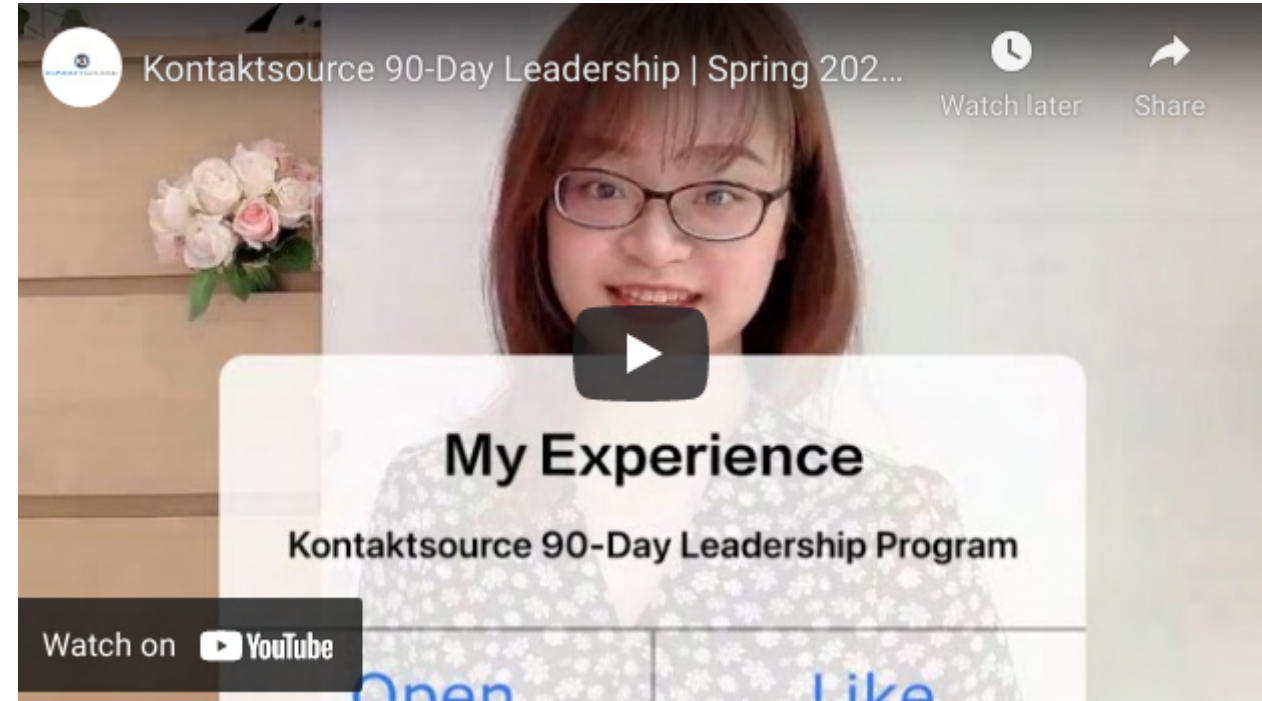
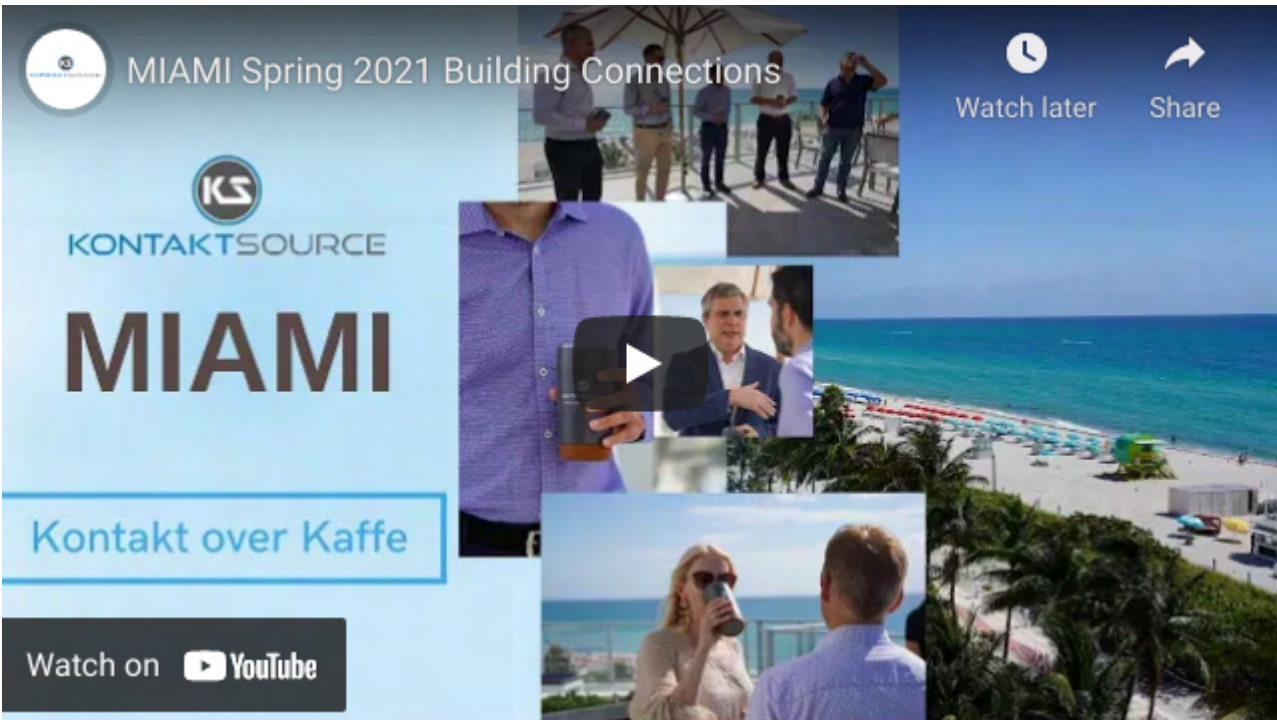
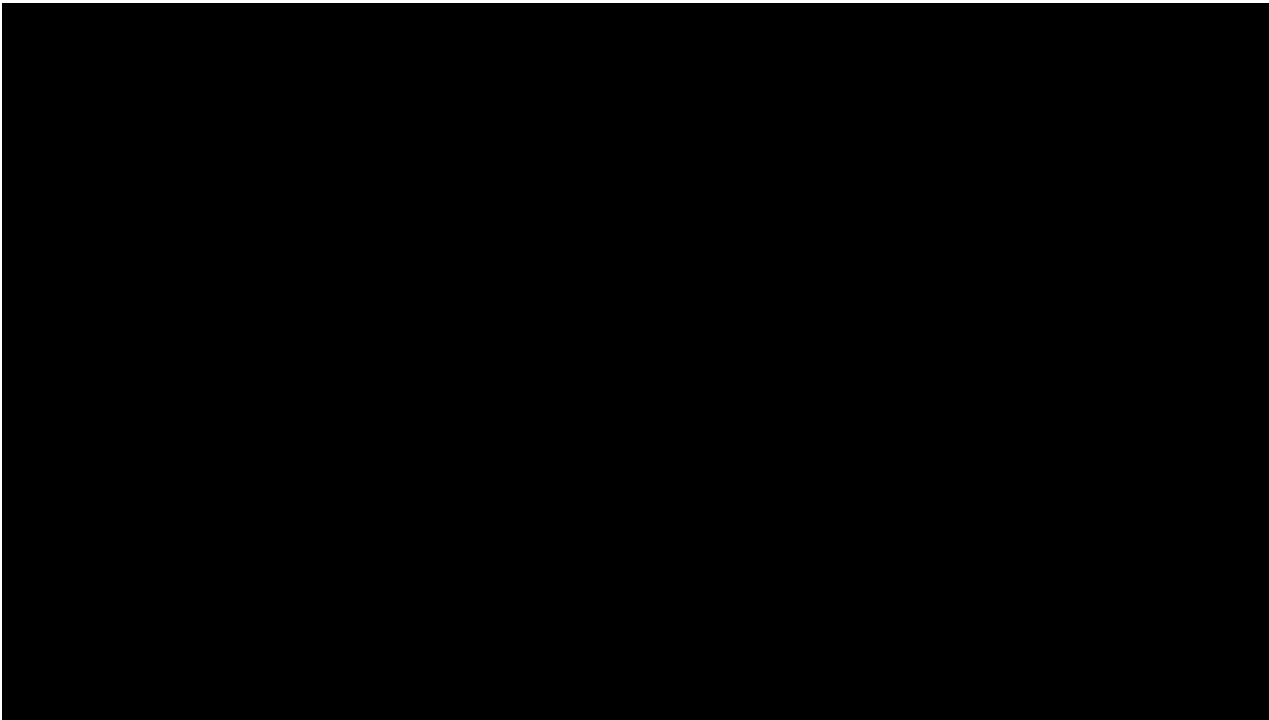


Breakfast Blend+ - 12oz Ground Coffee
\$14.99

www.kontaktsourcekaffe.com

MEDIA CONTENT

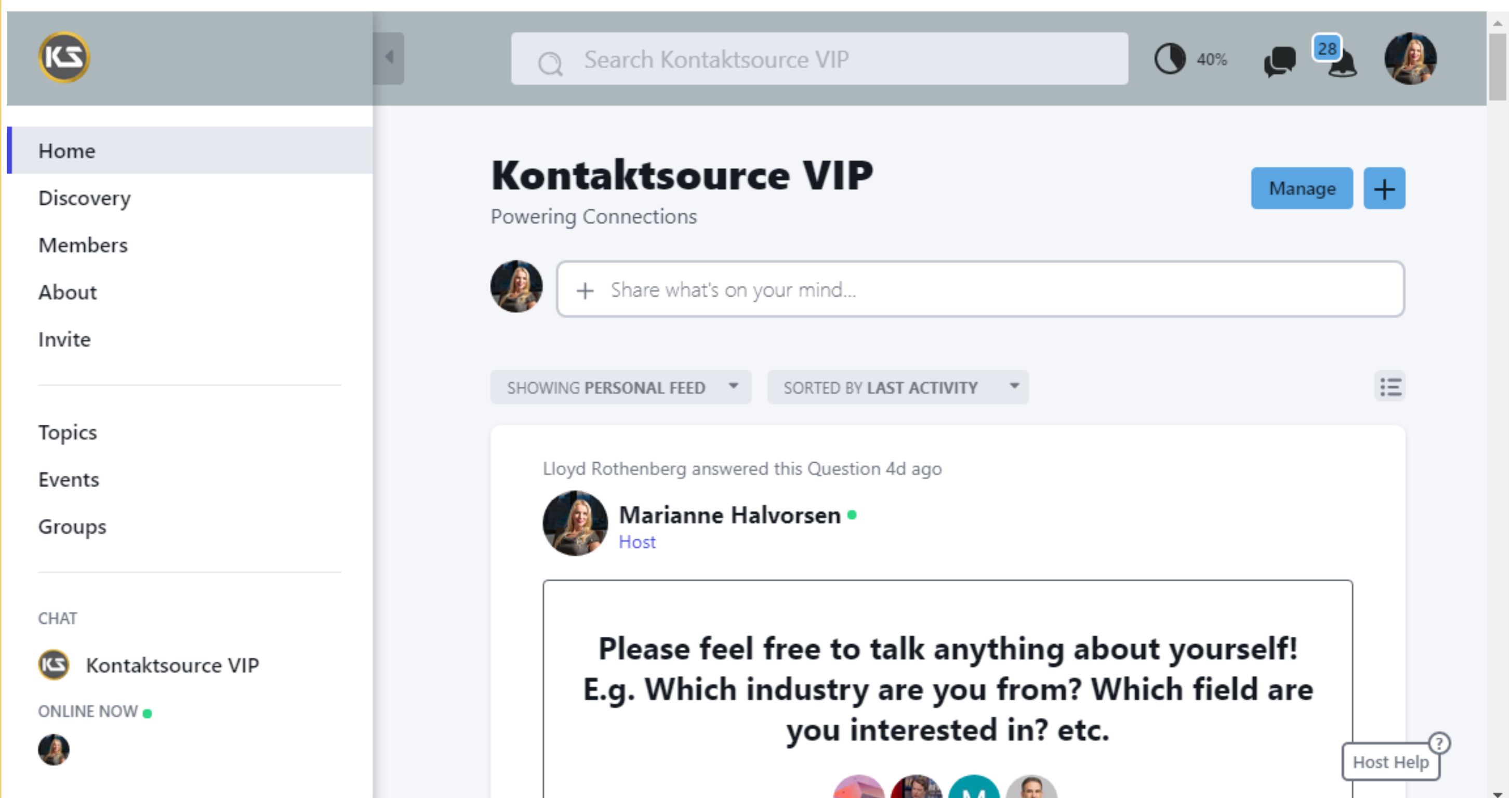
VIDEOS



KONTAKTSOURCE VIP APP

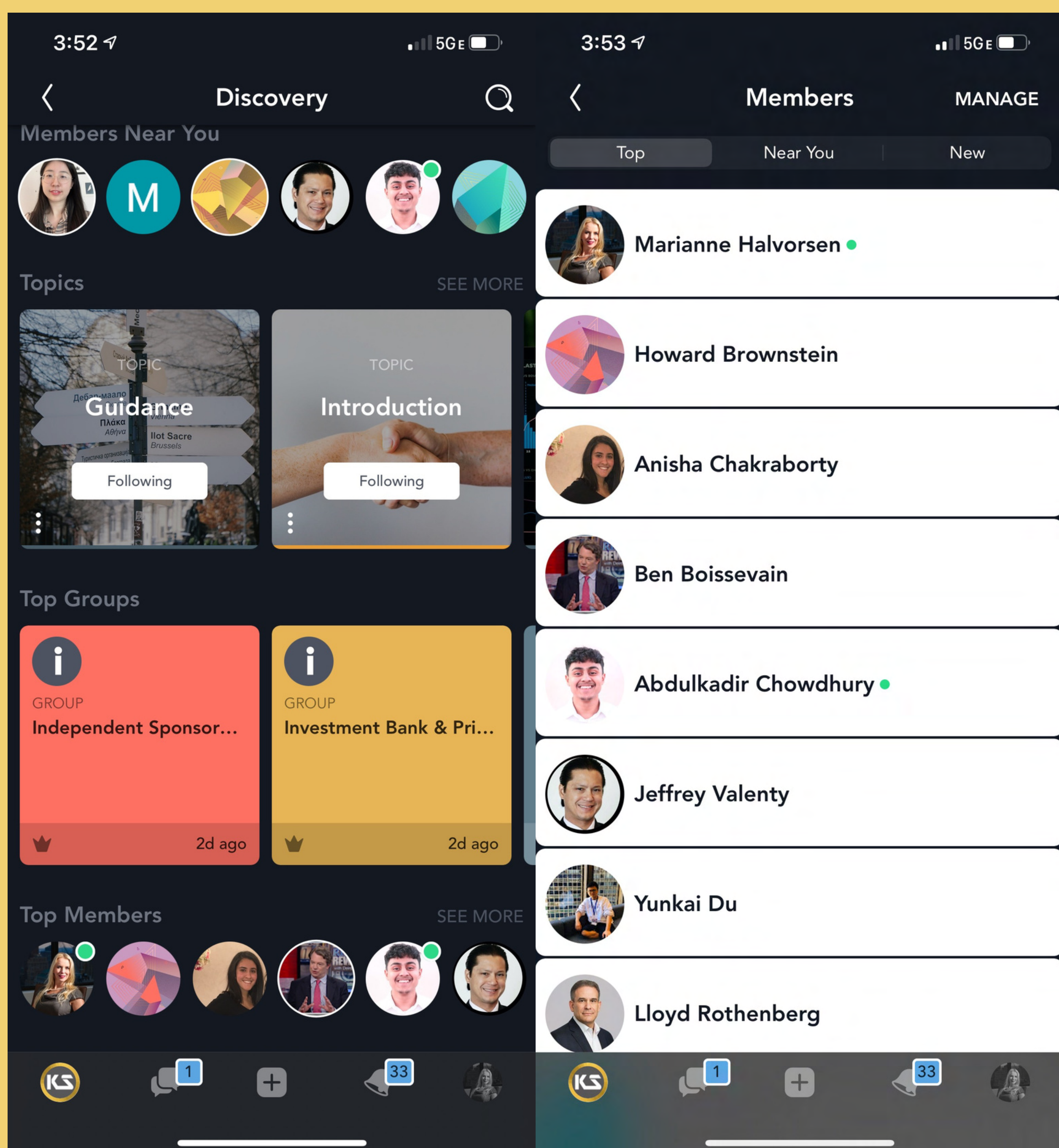


KONTAKTSOURCE VIP IS A UNIQUE NETWORKING FORUM TO SUPPORT BUSINESS CONNECTIONS BETWEEN INVESTMENT BANK AND PRIVATE EQUITY. WE OFFER DIVERSE EVENTS IN AN INTIMATE AND INVITING ENVIRONMENT DESIGNED FOR ENGAGEMENT.



KONTAKTSOURCE VIP APP

The Kontaktsource VIP community app allows members to easily connect with our network of private equity and investment bank professionals. Registration is available now and our virtual events can be easily accessed through the app.



KONTAKT POST

KONTAKT POST

JUNE 2020, ISSUE 1

Welcome to the First Issue of Kontakt Post

Hello!

Welcome to our first issue of Kontakt Post! I am very excited to launch this newsletter and continue this year expanding our efforts in the industry supporting deal flow for private equity, family office, independent sponsors, and investment banks.

As New York City slowly opens back up, we feel the heart and pulse of the city vibrate. Thank you COVID-19 for the opportunity to appreciate life and recognize the importance of human connections. Now, it's comeback time, so let's fall in love with New York City all over again.

Marianne Halvorsen
Founder, KontaktSource

Meet the Leadership Team of Summer 2020



Bradley Stone
Bentley University,
Class of 2021

Cleo Pontone
University of Michigan,
Class of 2020

Sanjana Chowdhury
City College New York,
Class of 2020

Yuxuan Fan
Fordham University,
Class of 2020

On June 1st, we welcomed a dynamic team of four for our Virtual Summer Internship. The team reflects diversified educational backgrounds and offers expertise individually to make KontaktSource grow bigger and better.

The team has a balance of two undergrad students and two graduate students. Brad is a B.S. in Finance, double Minor in Economics and International Affairs, Cleo is doing her BS in Information (UX), BA in Spanish. Sanjana graduated with an MS in Branding and Integrated Communications and Yuxuan is pursuing CFA Level II with an MS in Finance.

Meet them, learn about them, and show them your support!

Should you have an interest in participating in any future events hosted by KontaktSource or hosting your own event, please email marianne@kontaktsource.com for details. Thank you for being a part of our community!



Talk of the Town

Check out what industry experts are sharing about contemporary affairs and how KontaktSource can enable your business to tap on the opportunities.



Join our events to hear them live!

Upcoming Events



Follow us on



KONTAKT POST

JANUARY - FEBRUARY 2021, ISSUE 7



2020 IN REVIEW: WELCOME TO NEW AND EXPANDED WAYS TO CONNECT

Hello!

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As New York City slowly opens back up, we feel the heart and pulse of the city vibrate. Due to the circumstances of COVID-19, we got the opportunity to appreciate life and recognize the importance of human connections. Now, it's comeback time, so let's fall in love with New York City all over again.

Marianne Halvorsen
Founder, KontaktSource

Meet the Leadership Team of Spring 2021



Sissi Liang
Fordham University,
Class of 2020

Zirui Li
Fordham University,
Class of 2021

Kate Lee
Simon Fraser University,
Class of 2021

Ikyl Sari
Digital Film Academy,
Class of 2020

On February 1st, we welcomed a dynamic team of four for our Virtual Winter Internship. The team reflects diversified educational backgrounds and offers expertise individually to make KontaktSource grow bigger and better.

Sissi Liang from Fordham University has a master's degree in Applied Statistics and Decision Making, Business Statistics and Analytics. Zirui Li who's also from Fordham University is now doing her master's in Global Finance. Kate Lee is completing her B.A. in Communication in Simon Fraser University in Vancouver. Our film director, Ikyl Sari is a recent graduate from New York Digital Film Academy.

Meet them, learn about them, and show them your support!

KONTAKT POST

OCTOBER - NOVEMBER 2020 - ISSUE 5



Changing the Leaves and Turning the Page



Marianne Halvorsen
Founder, KontaktSource

Hello!

As the leaves change, it's time to turn the page on summer into a new chapter: "Getting to the heart of matters in business".

As I have been battling COVID-19 post viral syndrome symptoms of fatigue, muscle aches and brain fog, it has inspired me to work and think differently. Through our platform we have built a community of leadership, collaboration and sustained partnership. Thank you to all of our speakers, partners and recent graduates of our 90 Day Leadership Program for a powerful month of making connections that matter. I am excited to share this issue of our post with all of our activities.

Enjoy!

THANK YOU Speakers and Participants



Talk of the Town

Check out what industry experts are sharing about contemporary affairs and how KontaktSource can enable your business to tap into new opportunities. Follow our Social Media pages to hear them LIVE!



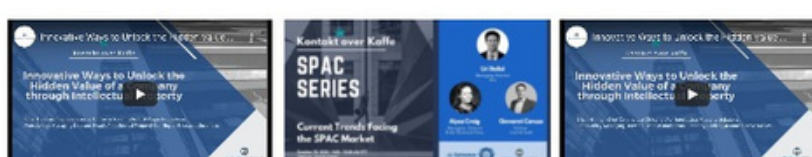
Tips & Tricks! How to Build Your Network



KontaktSource is committed to make connections that matter for all participants, including helping students. Check out our special version with Tips and Tricks on how to build your network:

1. Get Involved
2. Find People You Trust and collaborate
3. Know Your Value and support others

Highlights- Kontakt over Kaffe Events in October



Winter Leadership Team



Fall Leadership Team



Thank you for your sponsorship



KONTAKTSOURCE | 2021



Video Recap: 2020 Year End Review

Spot yourself in the video!

Thank you everyone for participating in our past networking events. We have put together last year's event highlights in a video.

Let's continue to make meaningful connections in the year 2021!

Be My Deal Partner

Inspired by Valentine's Day, we held a one-to-one networking event for people from private equity and investment banks to get together and connect over coffee.

Check out our event booklet [here](#).



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KontaktSource | 214 Front Street, New York, NY 10038

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Sent by marianne@kontaktsource.com

KONTAKT POST

KONTAKT POST

JANUARY - FEBRUARY 2021, ISSUE 7



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KONTAKTSOURCE | 2021



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KONTAKT POST

NOVEMBER - DECEMBER 2020 - ISSUE 6



KONTAKTSOURCE

Stepping into New Shoes

This has been a year to remember, and I am grateful for this community. Thank you for being part of it, and special thanks to this month's speakers.

In this issue of Kontakt Post, we step into some new shoes and launch KontaktSource Asia, and A KontaktSource Series "How to Build Connections" Episode 01 "Ways of Being".

Stay safe, and please reach out with any questions or suggestions.



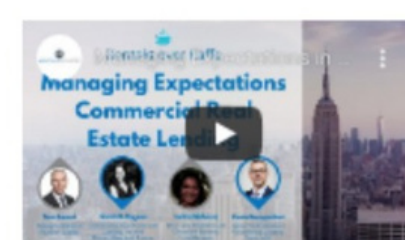
Marianne Halvorsen
Founder, KontaktSource

Our Highlighted Events in November

Kontakt Source Asia Website

Earlier this year we had our first cross border event, and based on positive feedback, we decided to expand our initiative by launching a new, separate website, KontaktSource Asia. We will continue to host creative virtual events with our partners with an 8-part series titled Kontakt over China. Please contact us should you have any suggestions.

Kontakt Kaffe

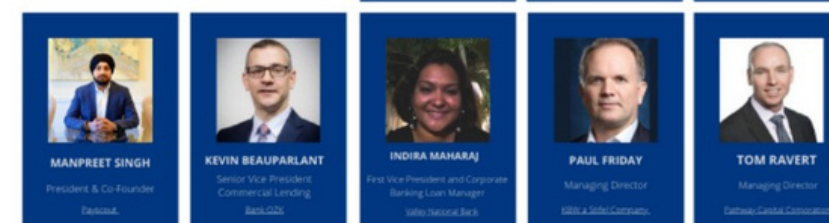


Big Applause to our Speakers and Participants

Kontakt Kaffe

Thank You for Being Part of our Community!

Every Wednesday 9AM - 10AM EST



Thank you for your sponsorship



KONTAKT POST

JULY 2020, ISSUE 2

Life Will Never be the Same, Life is Changing!

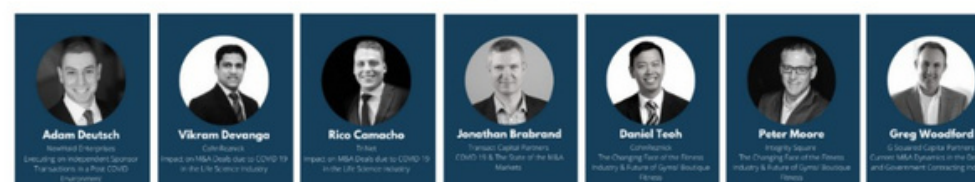
Hello!

Although COVID-19 has created significant obstacles to our mission of making connections that matter, KontaktSource's dedication to creating a better-connected world is unwavering. Through creatively implementing virtual programs and events within our vast network, we have proven to the community that networking under any conditions is still possible, with the right mindset. In fact, we have positioned ourselves for further growth by continuing our weekly virtual Kontakt over Kaffe series, introducing the Educational Series to support students, Launching our refreshed website and commissioning our brand new Chinese Leadership Team, which will focus on supporting the Chinese market.

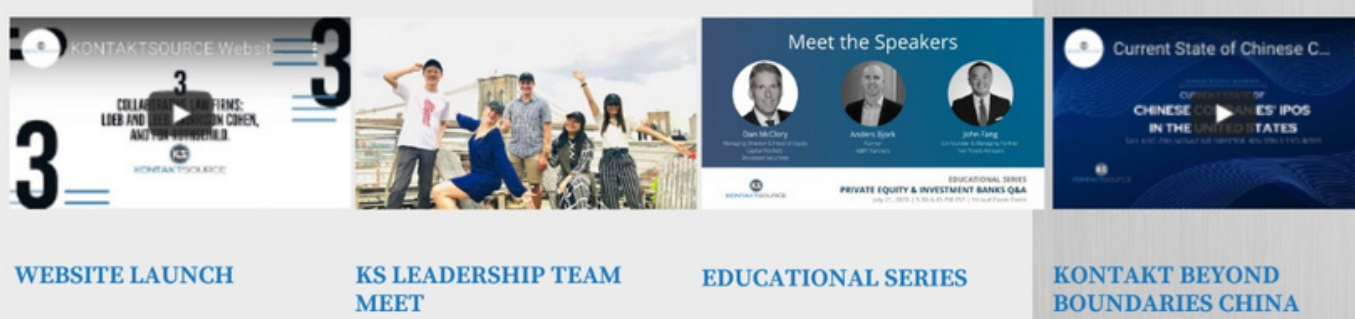
We are expecting August to be even more robust and eventful, stay tuned!

Marianne Halvorsen
Founder, KontaktSource

Big THANK YOU to the Speakers and Participants of Kontakt Over Kaffe Series- July!



Highlights- Events in July



"HOW TO BUILD CONNECTIONS"

A KontaktSource Series

Series 01 Episode 01:
"Ways of being"



We are excited to share the first episode of our new KontaktSource Series "How to Build Connections". Check out our first episode and subscribe to our YouTube Channel for more.

Talk of the Town

Check out what industry experts are sharing about contemporary affairs and how KontaktSource can enable your business to tap into new opportunities. Follow our Social Media pages to hear them LIVE!



Talk of the Town

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Sent by marianne@kontaktsource.com

KONTAKTSOURCE PODCAST

A weekly, ten to 15-minute podcast to bring your networking game to new heights guest-starring financial professionals to give you new perspectives on different topics. Currently, there are six podcasts out on Spotify.



Episode 6: Baseball, Philanthropy, and Networking with Ken Singleton



KONTAKTSOURCE 90 LEADERSHIP PROGRAM



The 90 leadership program allows for students to grow their networking skills and take on projects in order to gain professional experience. This three-phase program not only prepares students for their future careers, but also provides exponential growth. Created by Marianne Halvorsen, due to the hardships of COVID-19, this completely remote program functions through a weekly Zoom call schedule.



KONTAKTSOURCE

KONTAKTSOURCE 90 DAY LEADERSHIP TEAMS

SUMMER 2020



CLEO PONTONE
UNIVERSITY OF MICHIGAN
CLASS OF 2022



SANJANA CHOWDHURY
THE CITY COLLEGE OF NEW
YORK
CLASS OF 2020



BRAD STONE
BENTLEY UNIVERSITY
CLASS OF 2021



YUXUAN FAN
FORDHAM UNIVERSITY
CLASS OF 2020

FALL 2020



JACEY CHEN
PARSONS SCHOOL OF DESIGN
CLASS OF 2022



XIAOCHEN JIA
FORDHAM UNIVERSITY
CLASS OF 2021



RAN CHANG
FORDHAM UNIVERSITY
CLASS OF 2020



JINGYI LIAO
FORDHAM UNIVERSITY
CLASS OF 2021

KONTAKTSOURCE 90 DAY LEADERSHIP TEAMS

SPRING 2021



SISSI LIANG
FORDHAM UNIVERSITY
CLASS OF 2020



KATE LEE
SIMON FRASER UNIVERSITY
CLASS OF 2021



ZIRUI LUI
FORDHAM UNIVERSITY
CLASS OF 2021



IKLYL SARI
NEW YORK DIGITAL FILM
ACADEMY
CLASS OF 2020



JACEY CHEN
PARSONS SCHOOL OF DESIGN
CLASS OF 2022

SUMMER 2021



KEVIN NOGUERA
KEAN UNIVERSITY
CLASS OF 2022



CINDY PENG
FORDHAM UNIVERSITY
CLASS OF 2021



KATIE NUGENT
NEW YORK UNIVERSITY
CLASS OF 2022



ALI ROHRBAUGH
MUHLENBERG COLLEGE
CLASS OF 2022

KONTAKTSOURCE 90 DAY LEADERSHIP TEAMS

FALL 2021



EMILY SCARCELLA

CENTRAL CONNECTICUT STATE UNIVERSITY
CLASS OF 2021



YUNKAI DU

TUFTS UNIVERSITY
CLASS OF 2024



Anisha Chakraborty

RUTGERS UNIVERSITY
CLASS OF 2024



Abdulkadir Chowdhury

FORDHAM UNIVERSITY
CLASS OF 2023
