

NEWS RELEASE

## J.S. Held: Strategic Advisors to 65% of the Fortune 100

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JERICHO, N.Y., Sept. 26, 2024 /CNW/ -- Global consulting firm J.S. Held is proudly celebrating 50 transformative years as strategic advisors to a broad spectrum of clients, including 65% of the Fortune 100 company executives, boards of directors, and their financial investors.



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J.S. Held's expertise in strategic advisory is built upon five decades of experience in the most rigorous venues.

**Strategic Advisory** at J.S. Held is multi-faceted and enriched by a legacy of risk management that results in solutions that are as comprehensive as they are actionable. J.S. Held Strategic Advisory clients benefit from a curated collection of technical, scientific, and financial experts, entrepreneurs with an unrivaled understanding of both tangible and intangible assets, ensuring that the advice

clients receive is not just theoretical but grounded in real-world experience and innovation. Whether focused on addressing a unique circumstance or enhancing a company's business operations, every Strategic Advisory assignment begins with understanding the clients' overall concerns and objectives.

Generally, our mandate is established by:

- Senior management teams of operating companies
- Public and private investors
- Corporate Boards of Directors
- Investment bankers
- Counsel
- Business consultants

**Michael Jacoby, CTP**, of Phoenix Management, a part of J.S. Held, who has advised more than 400 clients in a variety of industries, including roles as an independent director and interim manager for 30 companies, notes, "The diverse collection of experts at J.S. Held ensures that the strategic guidance we provide to businesses of all sizes is practical, grounded in real-world experience and designed to provide meaningful and lasting impact."

**James E. (Jim) Malackowski, CPA, CLP**, of Ocean Tomo, a part of J.S. Held, observes, "In today's knowledge-driven economy, where 90% of company value is comprised of intangible assets, intellectual property (IP) is often the most valuable asset a company holds. At J.S. Held, we recognize that IP is not just a legal concern – it's a critical element in strategic business decisions and financial valuation." Jim continues, "Our experts are uniquely positioned to advise on the complexities of IP valuation, helping clients realize the value of their innovations in the marketplace." This multidimensional insight allows J.S. Held to provide clients with the tools to protect, leverage, and capitalize on their intellectual assets.

**Greg Esslinger**, a former practicing lawyer and former Special Agent for the FBI in the International Counterterrorism Division, with decades of experience advising companies and their counsel on international compliance, cross-border investigations, and risk management, highlights the unique and complex dynamics existing in frontier, emerging, and developed markets as organizations consider new market entry investments. "J.S. Held has deep expertise and experience across geographical regions and industries, strengthening our ability to provide strategic advisory to clients entering fast-growing and complex markets," Greg shares. "Our extensive public and private sector networks allow us to deliver proprietary analysis, gain access and influence, and achieve impact for clients seeking to maximize opportunities and mitigate risk."

**John Peiserich, Esq.**, environmental risk and compliance strategy expert, shares the triple bottom line focus – people, profit, and planet – of J.S. Held corporate sustainability and environmental, social, and governance (ESG)

consulting advisory, "Throughout the sustainability / ESG journey, we help business stakeholders shape their goals and strategies, select and implement technologies, enhance operations, mitigate risks, strengthen governance, and become more reputable and sustainable to drive long-term business value." John continues, "We combine the diverse technical, financial, technological, scientific, regulatory, investigative, and strategic advisory expertise across our global team."

The depth and breadth of our work in the insurance market provides a strong foundation in risk assessment, data analysis, global awareness, regulatory compliance, technological adaptability, and risk mitigation. Collectively, these skills better equip our experts to assess business risk across diverse geographies, geopolitical landscapes, compliance frameworks, and digital advancements. "In a world where uncertainty is the only constant, there is a need for something solid you can hold onto," observes J.S. Held President and Chief Executive Officer **Jonathon Held**. "Our name is our promise," he adds. "Our role as strategic advisor is emblematic of this promise, even in the face of the most daunting risks, clients have the expertise and guidance to act with confidence."

J.S. Held's expertise in strategic advisory is built upon five decades of experience in the most rigorous venues – state, federal, and international courts – and spans more than 150 different industry segments. Because our past success provides the best indication of our capabilities, J.S. Held is proud to feature a few representative engagements.

## Operational Advisory

J.S. Held continues to be a strategic partner to a \$350 million dollar revenue outdoor products manufacturer that experienced operational and financial challenges. Initially providing due diligence, over the course of more than 7 years, our experts have offered insight and strategic guidance, which has been leveraged by the company to continue its growth trajectory. We have recommended and implemented operational improvements and have helped to advance the Company's e-Commerce initiatives. We have also provided critical due diligence and transactional support in evaluating, closing, and implementing bolt-on acquisitions. As a trusted operational advisor, we have often served as an extension of the company's management, operating, and financial teams during years of expansion. Our experts helped fill crucial roles in driving the strategic planning process, spearheading operational improvements, serving as plant controllers on multiple occasions, and driving critical improvement projects.

## Financial Advisor in M&A

Ocean Tomo, a part of J.S. Held, was retained by a special purpose acquisition company (AltC Acquisition Corp.), co-founded by Sam Altman and Churchill Capital, in its acquisition of Oklo, Inc., a nuclear fuel recycling company and advanced manufacturer of small modular nuclear reactors. As a financial advisor on this transaction, experts

conducted a strategic assessment of Oklo's go-to-market plans and an analysis of the company's technology and intellectual property. The multi-disciplinary team's deep industry and regulatory knowledge was instrumental in performing a comprehensive analysis of the target company's strategy and providing a robust Fairness Opinion to the Board of Directors of AltC Acquisition Corp.

## New Market Entry

J.S. Held was retained by one of the largest global mining companies to help them understand key sector dynamics ahead of the prospective acquisition and related investment in a Central African country. As a trusted advisor, our team provided an in-depth report on Central African countries' key mining sector dynamics, including enhanced due diligence investigation through in-country visits. Our experts conducted both primary and secondary research on political developments, legal systems, finance and taxation laws, social issues, and operational risks to help understand the characteristics of the sector and identify the challenges and opportunities. Our report was essential in helping the client to better understand the operating environment in and around the mining sector in the Central African countries and helped guide their strategy for market entry.

## Carbon Management & ESG Strategy

With its deep expertise in carbon markets and trading, J.S. Held was uniquely positioned to assist a large, integrated oil and gas company facing a complex challenge: optimizing its carbon market exposure and minimizing the costs associated with complying with various carbon regulations. With the increasing prevalence and stringency of carbon pricing mechanisms worldwide, the client recognized the need for a comprehensive strategy to manage their carbon obligations effectively. With expert guidance from J.S. Held and the implementation of the carbon optimization trading book, the client realized significant value, including cost savings, revenue generation, risk mitigation, operational efficiencies, and regulatory compliance.

Learn more about the dedicated and entrepreneurial experts like Michael, Jim, Greg, and John, who help transform J.S. Held, explore our story, and celebrate this momentous milestone, our 50 & Forward celebration, with us at [jsheld.com](http://jsheld.com).

## About J.S. Held

J.S. Held is a global consulting firm that combines technical, scientific, financial, and strategic expertise to advise clients seeking to realize value and mitigate risk. Our professionals serve as trusted advisors to organizations facing high stakes matters demanding urgent attention, staunch integrity, proven experience, clear-cut analysis, and an understanding of both tangible and intangible assets. The firm provides a comprehensive suite of services, products, and data that enable clients to navigate complex, contentious, and often catastrophic situations.

More than 1,500 professionals serve organizations across six continents, including 81% of the Global 200 Law Firms, 70% of the Forbes Top 20 Insurance Companies (85% of the NAIC Top 50 Property & Casualty Insurers), and 65% of the Fortune 100 Companies.

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