

JOSHUA SCORESBY
Vice President

PROFESSIONAL SUMMARY

Mr. Scoresby is a Vice President at Areté Capital Partners where he is involved in both sponsor and fiduciary activities. Josh has more than seven years of experience working in financial services across multiple investment and advisory roles.

Prior to joining Areté, Josh was a Director in the Leveraged Finance & Financial Sponsors Group at UBS Investment Bank (UBS). While at UBS, Josh advised clients on structuring more than \$15B in financings across a wide spectrum of non-investment grade debt products and assisted clients in raising capital for acquisitions, leveraged buy-outs, refinancings, recapitalizations, and other purposes. Josh has extensive experience leading internal and external diligence efforts, negotiating legal documentation, and managing syndication processes. Outside of his deal-specific responsibilities, Josh worked as a lead campus recruiter, staffer, and line manager to Veterans Associate Program associates.

Prior to UBS, Josh graduated from the University of Notre Dame Mendoza College of Business. While in business school, Josh served as President of the Finance & Investments Club where he was responsible for leading multiple recruiting and training initiatives as well as managing the fund's investment portfolio. Additionally, Josh was an analyst in AIM XLVIII.

Prior to business school, Josh was an analyst at Charles Schwab Investment Management (CSIM) where his responsibilities spanned Portfolio Management, Product Management, Product Development, and Strategy across all asset allocation funds. While at CSIM, Josh managed the product positioning of 33 mutual funds with ~\$6.5B in AUM and helped launch the ~\$160M Target Date Index Funds product suite.

Josh is passionate about volunteering for organizations that work to increase financial literacy for youth in the community. He's previously spent time working with the Boys & Girls Club, Junior Achievement USA, and UStrive.

Josh holds a Master of Business Administration from the University of Notre Dame Mendoza College of Business and a Bachelor of Science in Economics, Cum Laude, from the University of Utah.



PROFESSIONAL BIOGRAPHY

CAREER EXPERIENCE

ARETÉ CAPITAL PARTNERS
Vice President

LOS ANGELES, CA
4/23 – Current

UBS INVESTMENT BANK
Director

NEW YORK, NY
7/19 – 3/23

CHARLES SCHWAB INVESTMENT MANAGEMENT
Analyst

DENVER, CO
6/15 – 8/17

SELECT TRANSACTION EXPERIENCE

Leading Fintech Company (Various) – Sole Arranger on ~€2,500M in bridge loan financings

Leading Wealth Management Company (2022) – Lead Left Arranger on a ~\$500M high yield financing

Bettcher Industries (2021) – Lead Left Arranger on a ~\$500M financing package for a Leveraged Buyout by KKR

INW (2021) – Lead Left Arranger on a ~\$540M financing package for a Leveraged Buyout by Cornell Capital

Rite Aid (2020) – Lead Dealer Manager on a ~\$1,125M Uptier Exchange

EDUCATION/CERTIFICATIONS

UNIVERSITY OF NOTRE DAME, MENDOZA COLLEGE OF BUSINESS
Master of Business Administration, Finance & Investments

NOTRE DAME, IN
2019

UNIVERSITY OF UTAH
Bachelor of Science, Economics

SALT LAKE CITY, UT
2015

* References Available Upon Request *