



**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 nine 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, complemented by operating experience building detailed financial models and leading broader financial analyses to support strategic and investment decision-making.

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*

**Park City, UT**  
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 Consumer Products Company (Borrower Side)** – Directed end-to-end, cross-functional diligence and financing execution to secure a \$100MM ABL facility, overseeing financial analysis, inventory and appraisal workstreams, field exams, data room management, and lender negotiations

**Leading Entertainment Company (Borrower Side)** – Coordinated the company's diligence and lender engagement process to establish a \$36MM ABL facility, managing collateral reviews, third-party field exams, data room materials, and cross-functional information flow across finance, legal, and operations

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

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

**Leading Industrial Manufacturing Company (Lender Side)** – Lead Left Arranger on a ~\$500M financing package for a Leveraged Buyout by KKR

**Leading Health & Wellness Company (Lender Side)** – Lead Left Arranger on a ~\$540M financing package for a Leveraged Buyout by Cornell Capital

**Leading Healthcare Company (Lender Side)** – Lead Dealer Manager on a ~\$1,125M Uptier Exchange

## EDUCATION/CERTIFICATIONS

UNIVERSITY OF NOTRE DAME, MENDOZA COLLEGE OF BUSINESS – *Notre Dame, IN*  
*Master of Business Administration, Finance & Investments*

UNIVERSITY OF UTAH – *Salt Lake City, UT*  
*Bachelor of Science, Economics*

\* References Available Upon Request \*

