



Jordan D. Chisolm

Member

Miami

jchisolm@cozen.com | (786) 871-3950

Jordan focuses his practice on business and corporate matters. His practice spans mergers and acquisitions, emerging businesses and venture capital, entity formation, financings, joint ventures, and general corporate matters.

Prior to Cozen O'Connor, Jordan was an Equal Justice Works fellow at Legal Services of Greater Miami, Inc. in Miami, where he founded the Neighborhood Entrepreneurs Project, Legal Services' pro bono small business practice. Through the project, he provided pro bono transactional legal services to more than 100 low-income entrepreneurs as outside general counsel and was a frequent speaker on panels and workshops, covering core legal issues for emerging business owners. Jordan also served as a corporate associate at an Albany, N.Y., area law firm.

He is a graduate of New York University School of Law, where he received the Dean John Sexton Prize for service to the NYU Law community. He is admitted to practice in New York and Florida and is a member of both the American and New York State Bar Associations.

While at NYU Law, Jordan led the student government as president of the NYU Student Bar Association (SBA). He also worked as a judicial intern for the Honorable Alexander Williams, Jr., of the U.S. District Court for the District of Maryland, Southern Division, served as an editor of the Annual Survey of American Law, and treasurer of the Black Allied Law Student Association (BALSA). He began his career a 2011 Urban Fellow in the New York City Mayor's Office of Operations. Jordan graduated in 2010 from George Washington University's School of Business with a BBA concentrating in finance and a minor in philosophy, *cum laude*.

Experience

Represented private equity-backed PES Benefits, a solutions provider to the employee benefits technology, administration, education, and virtual care industries, in its acquisition of the benefits administration business of Clarity Benefit Solutions.

Represented a financial sponsor in its platform acquisition of a meal delivery company providing meals to Medicare waiver recipients and other eligible populations.

Represented the shareholders of Aries Global Logistics, Inc., an international air and ocean freight forwarder, in its \$105 million sale to NTG Air & Ocean USA, Inc., a subsidiary of NTG Nordic Transport Group A/S, a publicly traded Danish transportation company.

Represented PCS Retirement, LLC, a provider of recordkeeping and other services to retirement plans and their participants, in its acquisition of Aspire Financial Services, as well as in connection with raising the equity and bank financing to fund the purchase price.

Represented an insurance broker/producer client in connection with its acquisition of both a Florida-based provider of managed care reinsurance and stop loss products and a California-based wholesale insurance brokerage firm.

Represented a financial services consultant to institutional investors in connection with its initial capital

Practice Areas

- Corporate
- Emerging Business & Venture Capital
- Mergers & Acquisitions
- Business

Education

- New York University School of Law, J.D., 2015
- George Washington University, B.B.A., *cum laude*, 2010

Bar Admissions

- Florida

Court Admissions

- U.S. District Court -- Northern District of New York

Affiliations

Greater Miami Chamber of Commerce, Leadership Miami Program Participant

Leadership Council on Legal Diversity, 2021-2022 Pathfinder

Awards & Honors

- Up & Comer Award, South Florida Business & Wealth, 2022
- Hot List, Lawyers of Color, 2022
- Best Lawyers in America, Ones to Watch, 2025

Jordan D. Chisolm

jchisolm@cozen.com

P: (786) 871-3950 | F: (305) 704-5955

©2024 Cozen O'Connor. All rights reserved.



raise. This transaction drew on the experience of the firm's corporate, tax, and labor and employment attorneys.

Represented PrecisionLender, a financial services software company, in its \$510 million acquisition by Q2 Holdings Inc., a publicly traded provider of digital solutions for financial institutions. The firm has long represented PrecisionLender, and previously represented the company in connection with five rounds of private equity financing.

Represented a New York-based private equity firm in its acquisition of substantially all of the assets and all cemetery properties of the 10 facilities comprising "Savannah Family of Funeral Homes" and "Savannah Family Cemeteries" located in Savannah, Ga., and the one facility known as "Kurzawa Funeral Home" located in South Amboy, NJ.

Represented Aspen Capital Group, LLC in its role as lead investor in the \$25 million Series B fundraising round of CLARA analytics, Inc., a provider of artificial intelligence technology in the commercial insurance industry. This transaction drew on the experience of the firm's corporate, tax, intellectual property, and labor and employment attorneys.

Represented Capital Region NLL, LLC in its acquisition of the National Lacrosse League's New England Black Wolves, moving the to-be-renamed team from the Mohegan Sun Arena in Uncasville, Conn. to Albany, N.Y., where it will play in the Times Union Center. Capital Region NLL is an ownership group comprised of high-profile members of the lacrosse community including Oliver Marti, Joe Dowling, Brett Jefferson, Sol Kumin, Zach Schreiber and Russ Sheppard. As part of the engagement, we successfully negotiated approval from the National Lacrosse League to transfer the franchise, as well as approval of the new ownership and home venue for the team. This transaction follows on the 2014 sale of the Philadelphia Wings lacrosse franchise to Mohegan Sun, in which the firm represented the ownership group, led by Brad Brewster, Michael French and Ted Goldthorpe, who continues to be represented by the firm and has an ongoing investment in the lacrosse franchise.

Represented Kingland Systems, a leading provider of enterprise data software, in all aspects of a strategic partnership and minority investment with Boston-based private equity firm ABRY Partners.

Represented Healthier Choices Management Corp. (HCMC) in connection with a rights offering of shares of common stock. Among other ventures, HCMC operates Ada's Natural Market, Paradise Health and Nutrition, and TheVitaminStore.com.

Represented a Kentucky distiller of American Brandy and other spirits in the sale of stock by shareholders holding 70 percent of the stock in the company to an industry-leading, strategic buyer.

Represented an emerging business that provides supply purchasing solutions to business in the creation of a \$20 million senior credit facility.

Assisted Auverity, Inc. -- a unique B2B digital ID platform that enables organizations, governments, and small businesses to manage COVID-19 vaccination certificates in a secure, intuitive, and easy-to-use platform -- with its corporate formation, IP protection, and creation of terms of service and customer contracts.

Represented Sherpa Software, LLC, an enterprise data governance and eDiscovery solutions provider, in its sale to Gimmel LLC, an information governance software solutions provider. This transaction drew on the experience of the firm's corporate; tax; labor and employment; employee benefits and executive compensation, and technology, privacy, and data security attorneys.

Represented a venture capital firm as lead investor in its \$10 million Series C investment in an online life insurance information and customer engagement SaaS provider.

Represented Capital Scrap Metals, LLC, a South Florida-based operator of three scrap metal yards, in connection with the sale of the business and underlying real estate to SA Recycling LLC, a national operator of metal recycling facilities. This transaction drew on the experience of the firm's corporate, tax, real estate, labor and employment, and employee benefits and executive compensation attorneys.

Represented Grovara, LLC, an online marketplace and software company that connects wellness brands with retailers, in a \$5.5 million Seed financing round raised as convertible notes.

Represented SteadyMD, Inc. in its \$25 million Series B Financing, led by Lux Capital. The growth investment will enable SteadyMD, an individual and B2B telemedicine platform, to scale the next phase of its growth.

Represented Healthier Choices Management Corp. (HCMC) in raising approximately \$27 million in gross proceeds through the sale of its common stock to its existing stockholders in an SEC-registered rights offering.

Represented a South Florida-based search fund in connection with its acquisition of a plumbing and HVAC services company.

Represented a direct private lender providing bridge financing for residential fix/flip and rental investors in the sale of the majority of its equity interests. This transaction drew on the experience of the firm's corporate, tax, and employee benefits and executive compensation attorneys.

Represented Concurrent Group, LLC, a full-service provider of construction, maintenance, and restoration services for utilities, electric membership co-ops, and municipally-owned power providers, in the sale of its equity interests to QualTek LLC, a provider of infrastructure services to the North American 5G wireless, telecom, and renewable energy sectors.

Represented Genuine Health Group, LLC, a management service organization (MSO) for Medicare patients enrolled in certain Medicare Advantage plans, in a \$160 million senior credit facility with Crestline Direct Finance, LP, a private credit fund.

Represented home care agency franchisee Interim Healthcare of the Treasure Coast, Inc. in its sale to Interim HealthCare Inc., a division of Caring Brands International and franchisor of the "Interim Healthcare" brand of home care agencies. This transaction drew on the experience of the firm's corporate, health care transactions, health care regulatory, tax, business litigation, and employee benefits and executive compensation attorneys.

Represented a clinical research startup focused on the treatment of inflammation-related diseases in a \$3 million capital raise from new and existing investors.

Represented Grove Oaks Capital, an investment partnership focused on acquiring privately owned businesses in the lower middle market space, in connection with its platform acquisition of McHale Roofing, LLC, a Florida-based roofing company, and a related capital raise.

Represented Clemson Engineering Hydraulics, Inc. in its sale to Verdantas LLC, an engineering and environmental consulting provider backed by RTC Partners, a Miami-based growth equity firm.