

CRACKEN, HARKEY & CO., L.L.C.



Structuring Win-Win Transactions
for Shareholders, Senior Management and our Partners

About Cracken, Harkey & Co., L.L.C.

Cracken, Harkey & Co., L.L.C. is a private equity firm based in Dallas, Texas.

We invest in and acquire select public small-cap companies.

We look for companies with talented and committed senior management with whom we can work to realize their company's full potential. Further, we look for companies for which we can offer current shareholders a material premium to market for their shares and an opportunity to reasonably exit their investment, as their company goes private.

We strive to structure a win-win transaction for a company's shareholders, senior management and our partners.

About Us > Our Objective

Cracken, Harkey & Co., L.L.C. is a private equity firm.

We invest in and acquire public small-cap companies that present a compelling and sustainable competitive advantage, a growing market opportunity and talented and committed senior management with whom we can work strategically to achieve a company's full potential.

The companies we select often present with little or no momentum in the public markets or research coverage. Further, they often hold shareholders captive in their investment by a flagging share price or an illiquid market for their shares. They enjoy few of the benefits of operating as a public company while enduring all of the additional costs, expenses and disruption from such operations.

We seek to invest in, acquire and then reinvigorate these companies to both achieve their full potential and to reward their senior management for doing so. Further, we offer their shareholders a material premium to market for their shares and an opportunity to finally and reasonably exit their investment.

We strive to structure win-win transactions for a company's shareholders, senior management and our partners.

About Us > Our Due Diligence Philosophy

We often begin studying a company after referral from a shareholder, analyst or banker who possesses an interest in a company that may meet our acquisition criteria.

Once a company is brought to our attention, we begin our first phase of due diligence. We review the company's public filings, analyst reports and trade publications, and analyze the company's products and services. Then, if the company appears to meet our acquisition criteria, we consult leading operators, analysts and investment bankers to further explore the company.

Our due diligence serves three important purposes:

- To enable us to determine whether a company presents a compelling and sustainable competitive advantage along with a core of talented senior management capable of and committed to achieving the company's full potential;
- To enable us to determine the principal problems we must solve to achieve the company's potential;
- To enable us to establish appropriate pricing for our bid and a financial structure to minimize our time to close.

Once we complete our first phase of due diligence and confirm a company meets our acquisition criteria, we make a bid to the company's directors. We believe if a company meets our acquisition criteria, its directors can best maximize shareholder value through a sale of the company. After we present our bid, we are prepared to either engage in a private negotiation with the company's directors or participate in an investment bank led auction to work toward a transaction.

About Us > Our Criteria

As a general rule, our threshold determination is based on the following core metrics:

- Baseline Enterprise Value/Baseline EBITDA ratio less than five.

"Baseline" Enterprise Value (EV) means the sum of the company's current market cap and long-term debt less the sum of the company's cash and cash equivalents and probable cash proceeds, if any, from the sale (and leaseback, if applicable) of fee real estate.

"Baseline" EBITDA means a company's EBITDA for the trailing four reported quarters adjusted to add back appropriate non-recurring charges and deduct the probable rent, if any, from the company's sale (and leaseback, if applicable) of fee real estate.

- Premium Enterprise Value/Baseline EBITDA ratio less than six.

"Premium" EV means the sum of the company's current market cap (multiplied by 150% to reflect a 50% premium to market) plus debt less the sum of the company's cash and cash equivalents and probable cash proceeds, if any, from the sale (and leaseback, if applicable) of fee real estate.

- Products and services that present a compelling and sustainable competitive advantage.
- Growing market opportunity.
- Vast majority of outstanding shares in the hands of shareholders who are not active in the business, and thus entirely dependent upon a steadily increasing market cap to achieve a return on their investment.

- Underperformance attributable to one or more problems we believe we can solve.

Further, we determine whether we can drive value in the proposed company by combining its resources with those available within any of our current portfolio companies. Our interest is logically greater when such synergies exist.

About Us : Our Principals

John R. W. Cracken

John R. W. Cracken was raised in San Antonio, Texas, and attended the University of Texas at Austin where he obtained a BBA (1984) and JD (1987) and represented the university in national interscholastic trial and appellate advocacy competitions. He earned his license to practice law in 1987.

From 1987 through 1996, Cracken achieved national acclaim as a litigator in the area of complex litigation. He was featured in the Wall Street Journal, New York Times, Dallas Morning News, San Antonio Express News, Texas Lawyer, American Bar Association's Barrister magazine and other publications. Between 1987 and 1996, he recovered more than \$100 million on behalf of clients.

Since 1997, Cracken has focused exclusively on private equity investing. Between 1997 and 1999, he and partner John Harkey led the acquisition and combination of two public (NASDAQ:ELCH and NYSE:SWH) and five private restaurant companies, presenting consolidated system-wide sales totaling more than \$240 million with operations in 16 states and Canada and 6,000 full and part-time employees. Cracken is today Vice Chairman of the resulting holding company, Consolidated Restaurant Companies, Inc. (CRC - www.croinc.com).

Cracken and Harkey co-founded RLX Technologies, Inc. (RLX - www.rlx.com) in 1999 to design, patent, manufacture, and launch the first "server blade" computing system. Cracken served as RLX's Chairman, President and CEO from RLX's inception until December 2000. As CEO, he led RLX in (1) recruiting its founding technical staff, (2) raising \$60 million in private equity, (3) designing, developing, prototyping and testing its ALPHA platform, (4) forging key strategic technology alliances with such companies as Transmeta Corporation (NASDAQ:TMTA) and IBM (NYSE:IBM), (5) forging key strategic venture alliances with such firms as Soros Private Equity Partners, ComVentures, Sternhill Partners and Authentic Ventures and (6) recruiting RLX's permanent management team including CEO Gary Stimac (who built Compaq's Systems Division into Compaq's most profitable division, generating \$4 billion in annual revenue).

Cracken and Harkey co-founded CriticalLogix, Inc. (CLX) in 2001 to design, patent, manufacture and launch the first server blade computing system based upon a solid-state InfiniBand backplane and optimized to serve as a Beowulf cluster. Cracken served as CLX's Chairman, President and CEO from CLX's inception until September 2001, when CLX's COO, CTO, and product vision became a permanent part of RLX. Cracken led CLX in (1) recruiting its founding technical staff, (2) raising private equity, (3) designing its proposed technology and (4) working with the venture community.

John D. Harkey, Jr.

Harkey was raised in Brownwood, Texas, and attended the University of Texas at Austin, where he earned a BBA with honors in Finance (1983) and a JD (1986). He earned an MBA from Stanford University School of Business in 1987.

From 1987 through 1992, Harkey worked with two private equity firms, including Capstone Partners in Dallas, Texas, where he led or participated in the acquisition and sale of both public and private companies presenting a combined market value in excess of \$500 million. He took an active operational role in transitioning and stabilizing acquired companies and turning around their operations. He has acquired companies in the healthcare, petrochemical, telecommunications, wholesale distribution and restaurant industries.

Between 1993 and 1996, Harkey and partner John Cracken practiced law together.

Between 1997 and 1999, Harkey and Cracken led the acquisition and combination of two public (NYSE:SWH and NASDAQ:ELCH) and five private restaurant companies, resulting in consolidated system-wide sales of more than \$240 million with operations in 16 states and Canada and 6,000 full and part-time employees.

Harkey is today Chairman and CEO of the resulting holding and operating companies, Consolidated Restaurant Companies, Inc. (CRC) and Consolidated Restaurant Operations, Inc. (CRO - www.croinc.com). He is responsible for (1) overseeing all of the CRO's operations, (2) participating in identifying, structuring and negotiating strategic transactions, and (3) working with CRO and its platform companies to most effectively assimilate new platform and roll-up acquisitions. Harkey also serves as a director of Total Entertainment Corp. (NASDAQ:TENT - www.tentcorp.com).

Harkey and Cracken co-founded RLX Technologies, Inc. (RLX - www.rlx.com) in 1999 to design, patent, manufacture and launch the first "server blade" computing system. Harkey served as RLX's Vice Chairman from RLX's inception until December 2000, and he serves today as a director of RLX. Harkey and Cracken also co-founded CriticalLogix, Inc. (CLX) in 2001 to design, patent, manufacture and launch the first server blade computing system based upon a solid-state InfiniBand backplane and optimized to serve as a Beowulf cluster. Harkey served as CLX's Vice Chairman from CLX's inception until September 2001 when CLX's COO, CTO and product vision became a permanent part of RLX.

Harkey is a member of the Board of Directors for the Circle Ten Council of the Boy Scouts of America.

About Us : Comments

"I've worked closely with John Cracken and John Harkey, and I've come to trust their judgment in evaluating companies and helping to lead an acquisition. They are very thorough in the conduct of due diligence and creative in structuring a win-win transaction for all involved. I hope to work with John and John on many acquisitions in the years to come." - Greg S. Feldman, Managing Partner, Wellspring Capital Management LLC

"John Cracken embodies many of the requisite qualities that make entrepreneurial companies succeed – strong leadership and vision, results-driven execution and endless stamina. If John focuses his time and energy on a project, it has a strong likelihood of success." - Michael Rolnick, Partner, ComVentures, Palo Alto, CA

"John Cracken possesses a unique combination of extraordinary vision and a capacity for detailed strategic planning. John has repeatedly demonstrated his ability to recruit talented management and provide the leadership necessary to uncover and execute against all of the operational initiatives necessary to achieve the goals he sets out for the team." - Guy Hoffman, Partner, TL Ventures, Dallas, TX

"John Cracken is one of the most directed and energetic executives with whom I have ever worked. Having worked with lots of startup and emerging companies, I have found that one of the main difficulties these enterprises face is 'distraction'... Keeping the team's eye on the ball is never a problem when John is in the loop. John is one of the most effective leaders I have seen at communicating the direction and goals of the work and letting everyone in the process understand how they relate to those goals." - Kevin Meek, Partner, Baker Botts, L.L.P., Dallas, TX

"John Cracken and John Harkey are a unique combination of relentless entrepreneurial energy and cool logic from a voice of experience – a balance that can add tremendous value to establishing the 'right' DNA for startups in their most critical phase." - Bill Tai, Partner, Authentic Ventures, Santa Clara, CA

"John Cracken is a pleasure to work with – diligent, honest and resourceful in achieving whatever objectives he undertakes. He's constantly moving toward closure of his objectives." - Mark Shank, Partner, Hughes Luce, L.L.P., Dallas, TX

"John Cracken is the master at what he does. He has extraordinary passion for his work, never losing sight of the goal. He's a visionary, yet practical. He inspires and executes. He listens intently and is open and honest in his communications. People trust him and want to be a part of his success." - Ed Francis, Partner, Accenture, Chicago, IL

"John Cracken and John Harkey provide the two critical ingredients for growing a business: finding exploitable new market opportunities, then rapidly building a world-class team of people to pursue them. Combining these unique skills with their personal commitment and involvement makes them a world-class resource for any company focused on growth." - Peter Vescuso, Vice President of Market Development, Brooktrout Technology, Needham, MA

"John Cracken is an innovator with an uncanny ability to execute his vision, and he is relentless in obtaining his goals. I like having John on my side in a deal." - Marc Still, Chief Executive Officer, Aspen Advisors, L.P., Dallas, TX

"John Cracken is the prototypical entrepreneur. His passion, energy and zeal are essential ingredients to enable a great idea to become a business success. John Harkey has a keen insight into business and a great financial mind. He is a tremendous asset to our Board and will be key to our success going forward." - Pat Collins, former Chief Executive Officer, RLX Technologies, Inc., The Woodlands, TX

"I've enjoyed being an investor with Cracken Harkey and advising them during the initial phase of their work on early-stage companies. They are unique in their direct and intense hands-on style." - Gordon Bell, Senior Researcher, Microsoft Corp., San Francisco, CA

"I joined El Chico in 1984, and John Harkey and his firm bought our company in 1998. From the outset, John's experience and leadership skills made our transition from a public to private company a reasonable one. Further, John's expertise in leading highly leveraged companies has proven vital to Consolidated Restaurant's success over the last four years. No one else in our organization understood

the special demands of operating in a highly leveraged environment, and John ensured we were (and remain) equipped to succeed in that environment." - Mark Lamm, President, Consolidated Restaurant Operations, Inc., Dallas, TX

"Few people understand how to operate well in a highly-leveraged environment, and John Harkey is one of those rare individuals. In less than one year at the helm of Consolidated Restaurants, John has refocused this company on initiatives to best ensure its long-term vitality. We've implemented more than a dozen new and innovative operational initiatives that are driving sales on the one hand, while at the same time reducing operating expenses and G&A by more than \$3 million (2% percent) on the other – the right combination. During my career, with more than 20 years of financial management experience and 15 years in the restaurant industry, a good portion of which has been in highly leveraged environments, I have worked with many talented executives and leaders, but clearly John has the best overall leadership skills and is the most talented turn-around executive with whom I've worked." – Paul Hargett, Chief Financial Officer, Consolidated Restaurant Operations, Inc., Dallas, TX

"John Harkey became CEO of Consolidated Restaurants at a time when we felt much uncertainty due to the eroding national and local economies. John established the critical path to stabilizing our operations in a recession, and he remains hands-on everyday in assisting us in maximizing our return on assets and growing those assets. I enjoy working with John, and I find his style of leadership very effective in motivating our team to succeed." - Don Dungy, President, El Chico Restaurants, Inc., Dallas, TX

"John Harkey has positioned Consolidated Restaurants to succeed during these tough economic times, and he's won the support of our entire leadership for his proposed changes. When we needed new vision and stronger leadership, John stepped in as our CEO, took responsibility for every important decision that followed, and I believe he's leading us to build a stronger, sustainable business. His passion is evident, contagious, and has invigorated the organization. His business judgment is outstanding." - David Wierman, President, Spaghetti Warehouse Restaurants, Inc., Dallas, TX

"John Harkey is a financial wizard and a superb manager with the vision to plan and accomplish tough goals. In any transaction or business, John quickly sees what needs to be done and does it. John Cracken distinguishes himself with his focus and follow through. John devotes all of his time, attention and energy to a project, and this is reflected in his ability to address the details of a transaction without losing sight of the big picture." - Chuck Reeder, Partner, Locke Liddell & Sapp, L.L.P., Dallas, TX

Experience : Services (Restaurants)

Consolidated Restaurant Companies, Inc. (CRC) reported for the year ended 2002 consolidated sales and resulting EBITDA of \$144,398,000 and \$14,699,000, respectively. CRC's operating company, Consolidated Restaurant Operations, Inc. (CRO - www.croinc.com), operates 103 company-owned stores and oversees another 36 franchisee or joint venture-operated stores in 16 states and Canada, employing 6,000 full and part-time employees.

Under John Harkey's leadership, CRO has formulated and implemented a host of innovative and material operational enhancements, increasing CRC's consolidated EBITDA on a recurring basis by more than \$6 million.

We began a consolidation within the restaurant industry in January 1998 by acquiring El Chico Restaurants, Inc. (then NASDAQ:ELCH) and Good Eats Restaurants, Inc. for combined total

consideration of \$75 million in cash and equity securities. Today, El Chico is CRC's casual dining platform in the Mexican segment of the restaurant industry, with 61 company-operated and 25 franchisee-operated stores in 11 states employing 3,730 full and part-time employees.

In September 1998, we acquired Cool River Restaurants, Inc. for combined total consideration of \$12 million in cash and equity securities. Cool River is CRC's casual dining platform in the Steakhouse segment of the restaurant industry, with three company-operated stores in Texas and Colorado employing 587 full and part-time employees.

In January 1999, we acquired Spaghetti Warehouse Restaurants, Inc. (then NYSE:SWH) for total consideration of \$62 million in cash. Spaghetti Warehouse is today CRC's casual dining platform in the Italian segment of the restaurant industry. Spaghetti Warehouse possesses 22 company-operated and 10 joint venture operated stores in 9 states and Canada and employs 1,496 full and part-time employees.

On June 26, 2000 CRC acquired Ill Forks Restaurants, Inc. for total consideration of \$10.5 million. Ill Forks joined Cool River as a member of CRC's Steakhouse platform. There is one Ill Forks store in Dallas, Texas.

Experience : Services : El Chico

El Chico (www.elchico.com) was founded by the Cuellar family in Dallas, Texas in 1940, as one of the first Tex-Mex concepts in the U.S. Today, the Company operates and franchises leading casual dining Tex-Mex brands. Its brands include El Chico®, El Chico Cafe®, and Cantina Laredo®.

El Chico offers customers a traditional Tex-Mex fiesta experience, and El Chico Cafe and Cantina Laredo, the Company's newest brands, offer customers an upscale contemporary experience at a higher per person average check.

The Company stands alone at its price-point in its commitment to freshness and quality. For more than 60 years, the Company has served its customers delicious Tex-Mex cuisine made with the freshest meats, cheeses, and vegetables.

Today, the Company has a total of 86 stores - 61 company-operated and 25 franchisee-operated. As proof of its broad appeal, the El Chico brand has successfully expanded into 11 states, including Alabama, Arkansas, Florida, Kentucky, Louisiana, Mississippi, Missouri, Oklahoma, South Carolina, Tennessee, and Texas. El Chico emphasizes large portions at value prices, with an average \$9-10 per person check.

Experience : Services : Cool River

Cool River (www.coolrivercafe.com) was co-founded in 1997 by Steve Hartnett in Dallas suburb Las Colinas, Texas, after Mr. Hartnett's success in founding and launching the Fox & Hound® brand, later acquired by Total Entertainment Corp. (NASDAQ:TENT - www.tentcorp.com). He and his partner, Gene Street, developed the Cool River Cafe brand as an upscale social gathering place for affluent Las Colinas.

Cool River Cafe first opened in Las Colinas in January 1998. At 23,000 square feet, Cool River Las Colinas is finished in a Southwestern decor and features a fine dining room, intimate cigar room, a large and energetic bar, and a regulation billiards venue. Cool River Las Colinas quickly became one

of the most profitable and popular restaurants in Texas, and it remains the Gold Standard in its segment.

Subsequent Cool River Cafes in Denver and Austin debuted to remarkable sales, evolving into "destination locations" that draw from a 10-20 mile radius.

A typical Cool River store serves more than 120,000 guests each year, with a \$50-55 per person average check.

Experience : Services : Spaghetti Warehouse

Spaghetti Warehouse (www.meatballs.com) was founded in 1972 by Robert Hawk. Hawk converted a warehouse in the historic West End of Dallas, Texas into an Italian restaurant, and the store instantly became a Dallas icon.

Today, there are 32 Spaghetti Warehouse restaurants, 22 company-operated and 10 joint venture operated. As proof of its broad appeal, the Spaghetti Warehouse brand successfully expanded into nine states – Florida, Georgia, Illinois, New York, Ohio, Oklahoma, Pennsylvania, Tennessee, and Texas.

Spaghetti Warehouse® and Old Spaghetti Factory®, the Company's original brands, emphasize traditional pasta dishes. Spaghetti Warehouse Italian Grill, the company's newest brand, offers a more upscale menu featuring grilled beef and chicken dishes at a higher per person average check. Each restaurant, unique in design, offers customers various Old San Francisco-style dining experiences. Customers may choose to dine in a restored San Francisco trolley car or in any one of several period-decorated dining rooms.

Spaghetti Warehouse offers large portions at value prices, with a \$9-10 per person average check.

Experience : Services : III Forks

III Forks (www.iiiforks.com) was founded in 1998 by Dale Wamstad in Dallas, Texas, after Wamstad's success in founding and launching the Del Frisco Double Eagle® brand, later acquired by Lone Star Steakhouse and Saloon, Inc. (NASDAQ:STAR - www.lonestarsteakhouse.com). CRC acquired III Forks in June 2000.

When Wamstad set out to create III Forks, he envisioned a "Texas French" environment featuring thick signature cuts of USDA Prime Beef and ocean-fresh fish and lobster. III Forks fulfilled Wamstad's vision that fine dining results from a perfect combination of food, service, atmosphere and music. With over 25,000 square feet of elegant dining, III Forks can accommodate intimate parties and 900-person social gatherings.

III Forks occupies a remarkable building, including a five-story white cupola topped by a shimmering 24-karat gold dome. III Forks' lobby could be mistaken for a fine hotel with its oriental carpets, stained-glass ceilings, elaborate wall lighting and a buzz of activity. With a curved mahogany bar, airy courtyard with elegant fountains and 12 separate dining rooms on two levels, III Forks is spacious, but its subdued lighting casts an intimate glow.

Open only for dinner, III Forks typically serves more than 120,000 guests each year, with a \$65-70 per person average check.

Experience : Technology (Computers)

Cracken, Harkey & Co., L.L.C. founded and built two technology companies, RLX Technologies, Inc. (www.rlx.com) and CriticalLogix, Inc. (CLX), between 1999 and 2001.

In 2001, RLX debuted the first production "server blade," a new technology that reduced a traditional 40-50 lb. rack-mounted server to a single printed circuit board assembly, along with a powerful blade-optimized software management tool. The server blade created a new product category in the Technology sector; following RLX's product launch, IBM, HP, and Dell created and announced their own server blade product line.

RLX has raised more than \$100 million in private equity since its inception, and its leading venture partners include Soros Private Equity Partners (New York, NY), Sternhill Partners (Houston, TX), Austin Ventures (Austin, TX), Ignition (Bellevue, WA) and ComVentures (Palo Alto, CA).

CLX expanded upon RLX's concept by completing initial feasibility and design work for a blade-based, high-performance computing workstation, utilizing a solid-state, InfiniBand back plane and optimized as a platform for Beowulf clusters. RLX subsumed CLX in 2001, and in 2002 RLX produced their first dual-processor, high-performance server blade.

Resources

Over the years, we have forged important relationships with professionals available to us in our due diligence and resulting transactions. These relationships include institutional private equity, mezzanine debt, senior debt and legal, accounting and financial services.

Our relationships include (in alphabetical order), among others:

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WORK GROUPS

We establish a work group for each company in which we invest or seek to acquire. Our work groups typically include our internal due diligence team, our transaction counsel and our debt and equity partners, as applicable.

To access a specific work group, insert the ticker symbol of the company to which your work group relates. For each work group, we post documents (PDFs) relevant to our progress in due diligence or an acquisition, some of which documents are in the public domain and some of which are confidential and proprietary. Note, however, that you must consult directly with our deal team to learn the most current information regarding any due diligence or acquisition, since changes often occur daily and sometimes those changes are material to our progress.

The documents posted for each of our work groups are intended exclusively for internal use by our staff and those engaged by us in connection with our efforts to due diligence or acquire a company, and this information should not be used by any other persons – For internal use only.