

Classic Strategies Group

Trusted advisors in mortgage banking M&A

Classic Strategies Group serves mortgage banking entrepreneurs with expert advice on all merger, acquisition and sales transactions. Our clients have spent years developing strong brands and profitable companies.

Mortgage Banking. Mergers & Acquisitions. This is our expertise.

Making complicated simple. Making formal informal. This is our philosophy.

This is Classic Strategies.

ABOUT US

We understand this specialized marketplace and do our homework to determine accurate valuations. We match buyers with sellers. We negotiate and manage the transaction details. Our expertise allows you to focus on yours – running your company.

Classic Strategies' consultants have proven track records with major Wall Street investment banks, and our offices are in the city. We know small- to mid-sized mortgage banks like the backs of our hands. But our philosophy is different. We demystify the process. We make it less formal. And we earn your trust and confidence in the process.

Dale Kurland has successfully negotiated the sale of four of my mortgage banking holdings. She has a unique grasp of the dynamics needed to analyze all aspects of a "deal" and to guide both buyer and seller to a mutually beneficial conclusion.

– John R. Delfino

OUR FOUNDER

Dale Kurland founded Classic Strategies on the belief that executives of small- to mid-sized mortgage banks don't need the overwhelming processes and expense of major Wall Street investment banks. They need a trusted partner with significant experience who will simplify the M&A process and who will be with them from initial discussions through the transaction closing.

Dale is the former head of Bear Sterns' mortgage banking merger and acquisition team and has been advising mortgage banks on M&A transactions for more than 20 years. Ms. Kurland is equally at home working directly for her own clients or being brought on as a consultant for larger organizations who don't have the specific expertise their clients need. She represents both buyers and sellers of mortgage banking companies and consults with management teams to formulate strategies and secure both equity and debt in today's changing market.

Prior to forming Classic Strategies, Dale recently participated in several major mortgage banking transactions including the sale of assets of JI Kislak Mortgage Corporation as well as the sales of James Madison Mortgage Corporation to the Dime Savings Bank and Knutson Mortgage Corporation to Temple Inland Mortgage. She advised Western Bancorp in its merger with Pacific National Bank and Desai Capital Management in its acquisition of Lender's Services, Inc. where she served on the Board of Directors until the sale of the company to Fidelity National Financial in February 2003. She also worked with the owners of First Town Mortgage Corporation and HomeSouth Mortgage in the sale of their companies to Chase Home Mortgage. She continues to work with this group in its new endeavor as an advisor on growth strategy.

C I S I G

CLASSIC
STRATEGIES
GROUP

Previously, as head of the Mortgage Servicing Group at Bear Stearns, Ms. Kurland traded servicing and advised the company's institutional clients in the valuation and sale of mortgage servicing portfolios. She was the senior banker on PNC's purchase of Sears Mortgage Corporation, which was an Institutional Investor "Deal of the Year."

CONTACT US

Dale Kurland, President
Classic Strategies Group, LLC
645 Madison Avenue
New York, NY 10022
212.996.2905
dkurland@classicsg.com