

REAG Announces Strategic Partnership with Capitaliz to Drive Integrated Exit Planning

Partnership Combines Exit Planning Platform with M&A Expertise to Deliver Seamless Solutions for Business Owners

CLEVELAND, OH, UNITED STATES, August 12, 2025 /EINPresswire.com/ -- [REAG](#), a premier lower middle market investment banking firm specializing in mergers and acquisitions, strategic ownership planning, and private capital markets advisory, today announced a strategic partnership with [Capitaliz](#), a leading exit planning platform. This collaboration represents a significant step forward in the industry's shift towards more integrated, outcome-driven solutions, empowering planning practitioners and business owners to work seamlessly across disciplines to build transferable business value.



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*Scott Mashuda, co-founder of
REAG*

The partnership addresses the growing need for unified services in professional planning, which continues to evolve and expand. Through their joint efforts, REAG and Capitaliz will focus on delivering comprehensive solutions to both communities to enhance execution, optimize strategy, and reduce fragmentation in the exit planning process.

As part of the strategic alliance, REAG has made an investment in the Capitaliz platform to fund further growth

and integration of advanced AI features designed to help advisors better identify potential exit opportunities. Leveraging REAG's decades of experience as strategic collaborators with business owners and their proven expertise in private capital market dynamics, the partnership will provide Capitaliz clients with enhanced market intelligence and actionable M&A insights needed to navigate critical junctures in their ownership journey.

"The partnership is important to us and our users. We have known the REAG team for several

years, and they are well known for their deep expertise and experience in middle market M&A," said Dr. Craig West, founder of Capitaliz. "This collaboration will allow Capitaliz advisors to activate opportunities for clients to exit successfully."

Scott Mashuda, co-founder of REAG, expressed enthusiasm for the partnership. "We're thrilled to partner with Capitaliz to bridge the gap between exit planning strategy and M&A execution – with an emphasis on early collaboration. And as strategic collaborators, this partnership allows us to bring our deep market expertise directly to the exit planning community, creating a more seamless path from business optimization to successful ownership transitions – meeting clients where they are and guiding them to where they want to be."

The partnership is expected to deliver improved outcomes for business owners by combining REAG's extensive M&A experience with Capitaliz's innovative platform technology, creating a comprehensive ecosystem of tools and solutions for the exit planning community.

About Capitaliz: Capitaliz is a leading exit planning platform that empowers advisors and business owners to build transferable business value through integrated, outcome-driven solutions. The platform combines advanced AI features with comprehensive tools and resources to help planning practitioners identify exit opportunities, optimize strategy, and guide owners through their critical transition journey with enhanced execution and reduced fragmentation.

About REAG: For over two decades, REAG's Investment Banking Team has specialized in Mergers and Acquisitions and Private Capital Market Advisory services in the Lower Middle Market. The firm is committed to meaningful engagement and long-term collaboration, helping leadership teams, private equity groups, and family offices optimize cash flow, overcome growth challenges, maximize business value, and successfully transfer ownership. REAG's comprehensive approach combines deep industry expertise with a commitment to delivering exceptional client service and winning outcomes.

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