Lucosky Brookman 2023 Year In Review

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Introduction

At Lucosky Brookman, we are dedicated to exceeding your expectations. Our firm prides itself on building strong client relationships and prioritizing tangible results. We are relationship focused and results driven.

Joseph Lucosky, Managing Partner

Lucosky Brookman is a corporate law firm with offices in New York, New Jersey and Pennsylvania representing both domestic and international clients in sophisticated corporate and securities transactions, mergers and acquisitions, SPACs, De-SPACs, secured and unsecured lending transactions, PIPE investments, intellectual property issues, corporate tax matters, complex litigation, dispute resolution, white collar defense, regulatory matters and general corporate matters.

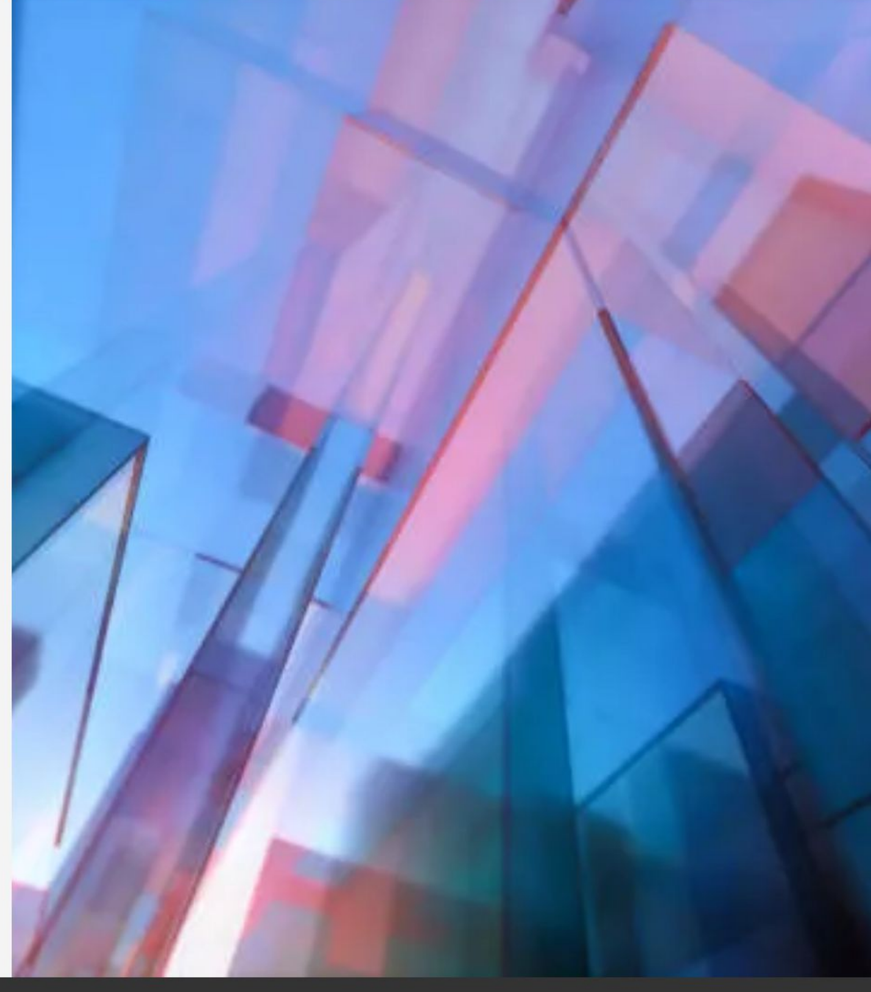
The Firm was established to serve clients in the emerging and middle markets. It is our mission to provide exceptional legal representation by listening to our clients and anticipating their needs. Each year, Lucosky Brookman publishes an annual progress report in order to examine current trends for emerging growth companies in the legal marketplace, as well as to highlight the accomplishments and milestones of the Firm in the prior year.

On behalf of the Firm, it is our pleasure to welcome you to our **2023 YEAR IN REVIEW.**

Our mission is to provide exceptional representation by listening to our clients and anticipating their needs.

LUCOSKY BROOKMAN REPRESENTS OVER 75 PUBLIC COMPANIES, INVESTMENT BANKS AND PRIVATE EQUITY FUNDS

Lucosky Brookman represents over 75 domestic and international public companies ranging from companies listed on the NYSE and the NASDAQ, to companies quoted on the OTCOX, OTCOB and OTC Pink Sheets. In addition, the Firm represents numerous private companies, private equity funds, investment banks and other financial institutions in connection with equity, debt and convertible financings. Lucosky Brookman takes pride in successfully representing its clients by providing insightful, cost-effective, practical, business-focused legal advice. We are continuing to enhance our capabilities and strengths in all of the Firm's practice areas. To that end, in addition to the Firm's leading Corporate and Securities Practices, in 2023 Lucosky Brookman has expanded upon its Litigation and White Collar and Regulatory Practice.



Accomplishments

In 2023, Lucosky Brookman excelled in guiding its clients through a wide range of corporate finance, lending, mergers and acquisitions, and securities transactions, as well as a broad range of litigation and white collar and regulatory matters.

Seth Brookman, Partner

Relationship Focused.

Results Driven.

In 2023, Lucosky Brookman and its clients remained active and engaged despite the challenging capital markets. While the Firm was not immune to this trend, it performed exceptionally well in representing its clients in connection with going-public transactions, initial public offerings, uplisting and cross-listing transactions, merger and acquisition transactions, S-1 and F-1 Registration Statements for primary and secondary offerings, Form 10 Registration Statements, Senior Secured Credit Facilities, SPACs, De-SPACs, and various other private equity, venture capital, corporate finance, and PIPE transactions. The Firm also continued its expansion of its results oriented litigation and white collar practice groups.

Throughout the year, Lucosky Brookman was successful in assisting its clients to advance their business interests across a range of legal services, including mergers, acquisitions, fundraising, banking, finance, litigation and arbitration and white collar regulatory matters.

The Firm pledges to maintain its high level of commitment to providing exceptional legal service to its clients in 2024 and beyond.

As we progress into 2024, the Firm renews its steadfast commitment to delivering unparalleled legal services of the highest caliber.

Joseph Lucosky Named by NJBIZ as a 2023 Leader in Finance

The Managing Partner of Lucosky Brookman, Joseph Lucosky, was recognized as a 2023 Leader in Finance in New Jersey by NJBIZ. This award recognizes the top professionals in finance across the state of New Jersey and celebrates New Jersey's financial executives at all levels who contribute to the success of their companies, their clients, and their communities. This is a remarkable accomplishment that highlights Mr. Lucosky's exceptional expertise and track record of success in the field of corporate finance.

His dedication, hard work, and energy have undoubtedly contributed to this award but his leadership and passion to serve his clients, his colleagues and his community is what really set him and the entire Lucosky Brookman team apart from most attorneys.

Mr. Lucosky said, "I am humbled by this recognition. It is a privilege to be sharing this award with experts in the finance sector. I am very thankful to NJBIZ and to all the firm's clients, colleagues and friends who nominated me and all my colleagues at Lucosky Brookman for the award."

This award is a great achievement for the Firm since Lucosky Brookman was the only law firm with less than 100 professionals included on the list and this is a result of the passion and effort that we all exhibit each day.

Lucosky Brookman Introduces Securities, White Collar, and Public Finance Blogs

At Lucosky Brookman, we recognize that staying informed is crucial in today's complex legal landscape. That's why we're thrilled to introduce our three specialized blogs, each designed to empower you with knowledge and practical guidance:

Our Securities Law Blog is your compass through the intricate world of securities regulations. Whether you're an investor, corporate executive, or legal practitioner, we provide expert insights into compliance, enforcement actions, and industry trends. Stay up-to-date with the latest developments, case studies, and actionable advice.

Our White Collar and Regulatory Blog examines the legal challenges can arise unexpectedly, especially in matters related to corporate governance, compliance, and investigations. Our White Collar blog equips you with the tools needed to navigate these complexities. We offer practical strategies to safeguard your interests.

Our Public Finance Blog serves as your go-to resource for understanding municipal bonds, infrastructure financing, tax-exempt securities, and more. Whether you're a municipal official seeking clarity or an investor evaluating opportunities, we break down complex concepts and keep you informed.

Empower yourself with knowledge. Visit our blogs today at Lucosky Brookman Blogs and discover how legal excellence meets practical relevance.

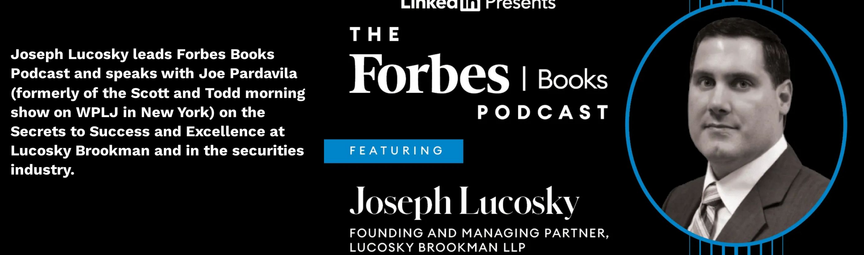
Keynote Address Presented by Joseph Lucosky at the 2023 Micro Cap Conference

At the 2023 Micro Cap Conference, Joseph Lucosky delivered the keynote address titled: "The Bell Isn't Going to Ring Itself: The Art of Uplistings, Crosslistings, and Micro-Cap IPOs." The event took place at the Planet MicroCap conference in Las Vegas.

In his presentation, Lucosky delved into the critical challenges that confront the Uplist, Crosslist, and IPO markets in today's dynamic financial landscape. He emphasized the complexities faced by both issuers and bankers during the process of marketing, executing, and pricing transactions on major exchanges such as Nasdaq and NYSE. Lucosky underscored the importance of having a skilled Attorney/Quarterback who can proactively lead the entire process, ensuring compliance, strategic decision-making, and successful outcomes.

As micro-cap companies seek growth opportunities and aspire to elevate their market presence, Lucosky's insights shed light on the intricate dance between legal expertise, financial acumen, and market dynamics. His address resonated with industry professionals, providing valuable guidance for navigating the intricate world of listings and initial public offerings.

Joseph Lucosky leads Forbes Books Podcast and speaks with Joe Pardavila (formerly of the Scott and Todd morning show on WPLJ in New York) on the Secrets to Success and Excellence at Lucosky Brookman and in the securities industry.



Expansion

In 2023, the Firm built upon its solid foundation in corporate and securities law, expanding its Litigation, White Collar and Regulatory Practice Groups, extending its ability to add further value to clients.

Lawrence Metelitsa, Partner

White Collar Litigation and Regulatory Defense Attorney David Rosenfield joins Lucosky Brookman as Partner

We are delighted to announce the addition of David Rosenfield to Lucosky Brookman as a Partner. David brings an extensive wealth of expertise, boasting over 30 years of experience in white-collar defense, securities law, bank regulatory defense, and civil litigation. His distinguished career includes notable roles such as Staff Attorney at the U.S. Securities and Exchange Commission in Washington, D.C., and Assistant U.S. Attorney at the U.S. Attorney's Office for the District of New Jersey, where he focused on prosecuting cases involving securities fraud.

Previously, David served as Partner and Chair of the white-collar defense and investigations practice group at a boutique law firm in New York City. Prior to this, he was a Member of the white-collar defense and investigations practice group at Herrick, Feinstein LLP.

David's legal expertise spans a wide spectrum, encompassing adept management of criminal prosecutions and internal investigations within corporations, as well as adept navigation of intricate regulatory matters. He has consistently offered invaluable guidance to companies, individuals, and senior executives involved in prominent cases, including those related to securities fraud, insider trading, and bribery.

David's insights extend beyond his legal practice, as evidenced by his authored articles touching upon pertinent topics such as false statements to the government and the intricacies of Special Counsel Robert Mueller's report. We are confident that David's wealth of experience and astute legal acumen will greatly enrich our firm and benefit our clients immensely.

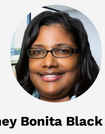
Insurance Coverage and Defense Attorney Kamilah Mitchell joins Lucosky Brookman as Partner

Ms. Mitchell's national practice includes all aspects of insurance coverage and coverage litigation, including advising her clients on a multitude of pre- and post-litigation coverage issues involving general liability, professional liability, environmental liability, employment practices liability, and allied health claims, among others. Kamilah focuses on early evaluation of claims, accurate assessment of exposure, and strategic analysis for effective resolution of her cases.

Previously, Kamilah clerked for the Honorable Tanya R. Kennedy, then Supreme Court Justice of the State of New York, New York County, where she gained significant experience in civil litigation. She is admitted to practice in the District of Columbia, Maryland, New York State, and the Eastern and Southern Districts of New York, and is a member of the District of Columbia, Maryland, and New York City Bar Associations. Kamilah is also a member of the National African American Insurance Association as well as the Corporate Counsel Women of Color.

Kamilah is a proud graduate of Spelman College, and prior to her legal career, she was a research scientist in the fields of environmental and physical chemistry.

Kamilah is also the Programs Director of Blankets4Vets, a non-profit initiative she founded with her mother in memory of her late father. Blankets4Vets provides free weighted blankets to Veterans throughout the United States to assist with mental health and related issues associated with their time in service.



Public Finance Attorney Bonita Black joins Lucosky Brookman as Partner

Bonita Black is a highly accomplished attorney and community leader. Her practice focuses on acting as bond, trustee, issuer's, borrower's, lender's, underwriter's and disclosure counsel in corporate (conduit) and municipal finance transactions on both a taxable and tax-exempt basis. She has acted as counsel to Fortune 500 companies including Amazon, KFC and U.S. Bank N.A., and many others. Her diverse experience includes representing national and community banks, issuers, housing authorities, non-profits, gas and electric companies, water and sewer companies, utilities, community organization and healthcare organizations. She is also highly experienced in mergers, acquisitions, divestitures, securities law, corporate and structured finance, securitizations, non-profit law, and corporate governance issues.

"We are thrilled to welcome Bonita Black to our firm as a Partner and the head of our Public Finance Practice Area," said Joseph Lucosky, Managing Partner at Lucosky Brookman LLP. "Bonita's extensive experience in public finance, coupled with her exceptional legal skills and industry knowledge, will significantly enhance the Firm's ability to provide comprehensive legal services to our clients. Bonita has a remarkable track record of representing Fortune 500 companies, banks, housing authorities, utilities, and non-profit organizations. Her deep understanding of numerous industries, coupled with her ability to navigate complex legal issues, makes her a trusted advisor to clients seeking expert guidance in the public finance arena and beyond."

"I am excited to join Lucosky Brookman and lead the Public Finance Practice Area," said Bonita Black. "The firm's commitment to excellence, client-centric approach, and dedication to delivering exceptional legal services align perfectly with my own values. I look forward to leveraging my experience and working closely with the talented team at Lucosky Brookman to further strengthen our presence in the public finance sector."

Corporate Finance Attorney Mark Zafrin joins Lucosky Brookman as Partner

Lucosky Brookman proudly announces the addition of Mark Zafrin as the newest Partner to the Firm's Corporate Finance Practice Area.

Mark is renowned for his adept handling of critical governance issues, ranging from risk management and restructurings to tax credit financing and the strategic utilization of Opportunity Zones. Moreover, his expertise extends to navigating the intricate landscape of healthcare licensing applications and navigating Federal and State regulatory frameworks, including anti-kickback rules, as well as managing Medicare and Medicaid audits.

A standout aspect of Mark's practice lies in his specialization in loan workouts and forbearance. His adept strategies have led to the successful prevention of numerous defaults and foreclosures, earning him the trust and admiration of his clients time and again.

Mark's prowess isn't confined to one area; he seamlessly integrates his in-depth understanding of mortgage and asset-based financing vehicles into his practice. Whether it's navigating HUD and FHA-insured mortgages or orchestrating conventional, mezzanine, and private equity financing, Mark's clients benefit from his comprehensive approach and meticulous attention to detail.

Mark Zafrin's arrival at Lucosky Brookman reinforces our commitment to excellence in corporate finance. His multifaceted skill set and client-focused approach make him an invaluable addition to our team.

Philanthropy

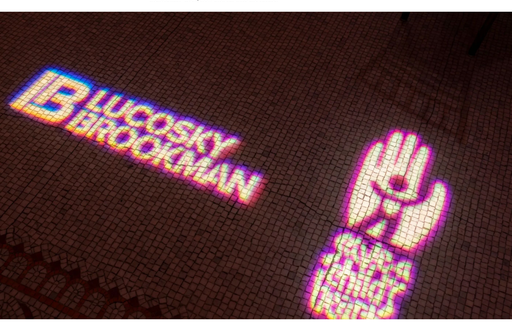
We are honored to have been able to help raise over $1,300,000 for charitable causes since the inception of the Firm with the help of our clients, friends, and colleagues.

Joseph Lucosky, Managing Partner

The Lucosky Brookman Foundation

Since our inception, we have dedicated considerable time and resources to giving back to the community with a hands-on approach to charitable activities. We established the Lucosky Brookman Foundation, a 501(c)(3) public charity, through which the Firm donates to qualified organizations on behalf of the Firm and through which we are able to receive donations from charitable friends, clients, and colleagues. The Foundation was created to take over the management and coordination of the Firm's ever-increasing charitable contributions and activities. The Lucosky Brookman Foundation's primary goal is to use the power of philanthropy to impact the lives of those less fortunate, with a particular focus on children's causes. The Foundation hopes to educate individuals and bring awareness to various sponsored initiatives that make a profound difference in other individuals' lives, now and far into the future.

Lucosky Brookman Foundation, a 501(c)(3) public charity, uses the power of philanthropy to impact the lives of those less fortunate, with a particular focus on children's causes.



The Lucosky Brookman Foundation continues support for the Save a Child's Heart Foundation, raising over $1,300,000 to date

Since 2014, Lucosky Brookman has been committed to making a positive impact on the world by supporting charitable causes. With the unwavering support of its clients, friends, and colleagues, the firm has raised $1,300,000 for charity.

The net proceeds from these fundraising efforts have a profound effect on the lives of children in developing countries. Specifically, they enable children to receive critical pediatric heart surgery and essential post-operative care. These life-saving procedures are often unavailable to children in regions where access to quality healthcare is limited.

One of Lucosky Brookman's key philanthropic initiatives is its partnership with Save A Child's Heart (SACH), an international humanitarian project. SACH's mission is clear: to improve the quality of pediatric cardiac care for children suffering from congenital and rheumatic heart disease in developing countries. Through its dedicated efforts, SACH has treated thousands of children, ranging from infants to 18-year-olds, providing them with a chance at a healthier future.

The firm's Managing Partner, Joseph Lucosky, actively contributes to SACH's mission by serving on its Board of Directors. Additionally, Lawrence Metelitsa, a Partner at Lucosky Brookman, is a member of SACH's regional New York Board of Directors. Their commitment exemplifies the firm's dedication to making a tangible difference in the lives of others.

At Lucosky Brookman, charitable giving is paramount—it's a core value deeply ingrained in the firm's culture. Beyond raising funds, the firm actively participates in large-scale events that engage everyone, including family and friends. Previous events have included charity golf outings, casino nights, and other gatherings, all aimed at supporting causes that matter.

The Lucosky Brookman Foundation, established in 2016, plays a pivotal role in managing and coordinating the firm's charitable contributions. Its primary focus is on children's causes, aiming to educate individuals and raise awareness about initiatives that create lasting positive impacts. Through action, Lucosky Brookman demonstrates that its commitment extends beyond legal excellence—it extends to making a difference in the lives of those less fortunate.

On behalf of the entire SACH organization, I wish to extend my heartfelt appreciation to Lucosky Brookman, and their clients, friends and colleagues for their extraordinary philanthropy and commitment.

David Litwack, Executive Director of Save A Child's Heart, U.S.

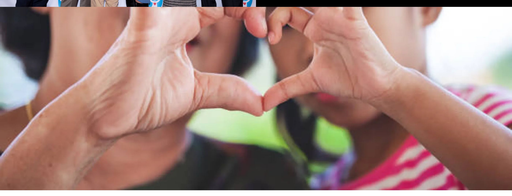
Lucosky Brookman Raises

$1,300,000

On November 9, 2023, Lucosky Brookman LLP, in collaboration with Co-Sponsor Spartan Capital Securities, LLC, achieved a remarkable milestone by hosting our 8th annual charity event at the prestigious Capitale in NY. The evening was an overwhelming success, bringing together over 400 enthusiastic sponsors, colleagues, and friends who collectively raised approximately $400,000 in support of Save a Child's Heart (SACH).

"The Firm's event was a resounding success, thanks to the generous support of our outstanding sponsors. Their commitment to our cause allowed us to make a meaningful impact, raising vital funds for the Save a Child's Heart Foundation. Together, with our partners and supporters, we're making a difference in the lives of children around the world. We are truly grateful for their unwavering dedication and generosity." – Lawrence Metelitsa, Partner at Lucosky Brookman

We extend our heartfelt gratitude to all those who contributed, making this event a beacon of hope for children in need. As we reflect on this year's success, we eagerly anticipate the future. Save the date for next year's event, as we gear up to celebrate our 10th anniversary! Together, we are creating a legacy of compassion, healing, and hope.



Lucosky Brookman Partners support the Make-A-Wish Foundation

As part of Lucosky Brookman's continuing commitment to children's charitable causes, over the past five years, Lucosky Brookman has donated over $50,000 to the Make-A-Wish Foundation. The Make-A-Wish Foundation grants wishes to children with life-threatening medical conditions. According to the Make-A-Wish Foundation, the granting of wishes makes children feel stronger, more courageous, and more determined to overcome their illnesses. Many families and healthcare providers believe the wish experience is the turning point in a child's battle against their illness. Lucosky Brookman is proud to be an ongoing sponsor of the Make-A-Wish Foundation.

Lucosky Brookman Donation

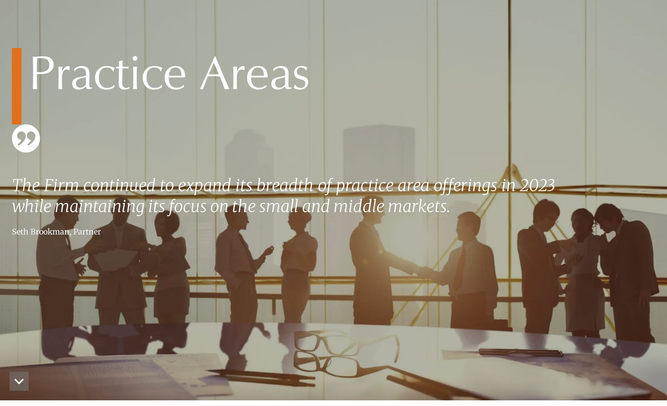
$50,000

The Firm once again sponsors the Far Hills Race meeting for the seventh year

Lucosky Brookman continues its philanthropic efforts each year by sponsoring and attending the Far Hills Race Meeting, also known as "The Hunt". The Hunt is a charity horse race that benefits the Robert Wood Johnson University Hospital, RWJ Barnabas Health, and the Cancer Support Community of Central New Jersey. The event draws more than 35,000 spectators each year and has raised more than $18,000,000 since 1950. 2023 marked the seventh annual sponsorship of The Hunt by Lucosky Brookman.

Each year The Hunt provides the Firm's attorneys, clients, friends, and colleagues an opportunity to build relationships in an informal and relaxing atmosphere while supporting a worthwhile charitable endeavor.

Seth Brookman, Partner



Practice Areas

The Firm continued to expand its breadth of practice area offerings in 2023 while maintaining its focus on the small and middle markets.

Seth Brookman, Partner

Practice	Leaders
Corporate and Securities Initial Public Offerings Secondary Offerings Private Placements (PIPEs) Mergers and Acquisitions Reverse Mergers Acquisition Financings Joint Ventures NYSE and NASDAQ Listing Matters Uplistings Cross-Listings Dual-Listings Direct Listings SPACs De-SPACs Exchange Act Reporting and SEC Compliance Corporate and Commercial Transactions Equity Lines of Credit Recapitalizations (Reverse and Forward Splits) Rule 144 Matters General Corporate Matters Corporate Governance Registration Statements (S-1, S-3, S-4, S-8, Form 10) DTC Deposit Chill Representation	Joseph Lucosky Lawrence Metelitsa
Banking and Finance Term and Revolving Lending Transactions Asset-based Lending Transactions Private Placement Offerings Convertible debt transactions Preferred equity and warrant transactions Letter of Credit Transactions Bridge Loans Workouts, Restructurings, Asset Foreclosures and Loan Sales Revolving Lines of Credit Hedge Fund Investments Private Equity Investments Healthcare M&A and Financings HUD Financings U.S. Federal Housing Authority (FHA) matters General healthcare lending	Seth Brookman Rodrigo Sanchez
Mergers and Acquisitions Merger transactions SPACs De-SPACs Reverse Mergers Assets and share acquisition and sale transactions Joint Ventures Tender Offers Share Exchanges Representation of Boards of Directors Pre-acquistion Planning	Joseph Lucosky Ian Liao

Taxation Mergers and Acquisitions tax planning International tax planning Tax Structuring in Business Expansions Securities Offerings tax counseling Debt Issuances tax counseling Investment Fund Structuring Executive Compensation and Employee Benefits Private Investment Fund Tax Planning Onshore and Offshore Inbound Tax Planning	Chris Haunschild
Litigation Investor Litigation Securities Litigation Alternative Dispute Resolution Insurance Defense Resolution White Collar Defense Business Divorce Litigation Complex Commercial Litigation	Sam Blatnick
White Collar Defense and Regulatory Investigations Securities Litigation SEC Investigations & Subpoena Response FINRA Investigations Officer & Executive Director Investigations Internal Investigations & Whistleblower Allegations Micro & Small Cap Investigations Securities Fraud	David Rosenfield
Insurance Coverage and Defense Insurance Defense Litigation Insurance Coverage Mass Loss and Product Liability Asbestos Litigation Construction and Labor Law litigation Primary and excess coverage counseling and litigation	Norman Golub

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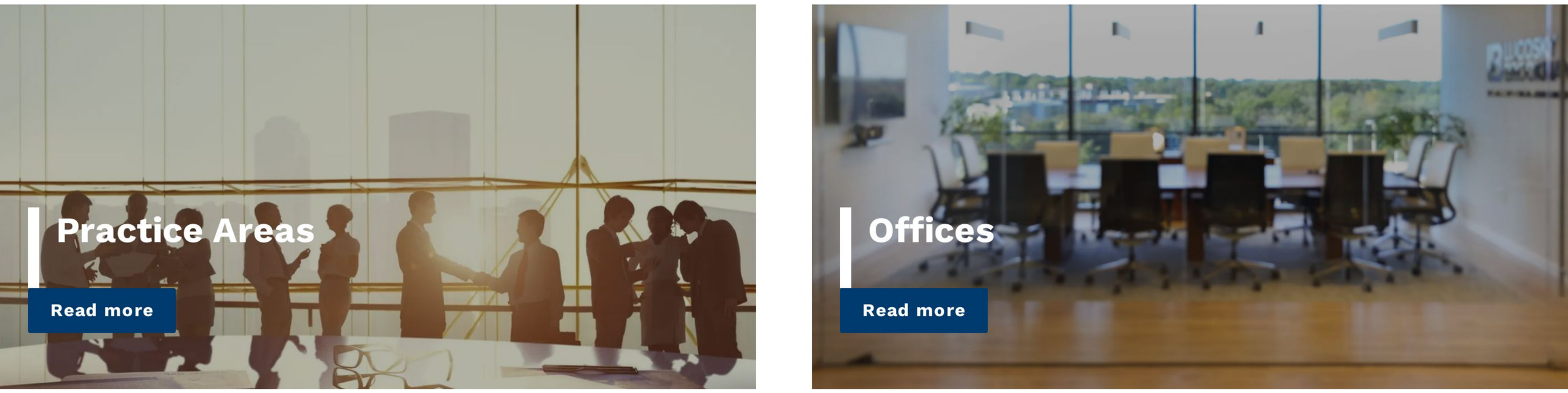

Ms. Hogan joins Lucosky Brookman after ten years working at Cravath, Swaine & Moore LLP. She has also worked as a Partner at White & Case LLP and Linklaters LLP. She served as Director at Deutsche Bank and has done strategic consulting work including revenue enhancements, deposit growth, FX derivatives, and mergers for large banks. Ms. Hogan has led anti-financial crimes investigation, risk framework implementations, and corporate governance matters.

While at Lucosky Brookman, Ms. Hogan will continue her diverse range of work, which includes work for industries in the following sectors: financial institutions, energy and utilities, healthcare (medical devices, biotech and pharmaceuticals), leisure (gaming and hotels), real estate, telecommunications, media and technology, transportation (airlines, automotive, shipping, rail), and retail.

Ms. Hogan is a graduate of Cornell University Law School. She has served as an Adjunct Law Professor at Fordham University School of Law. She is a Visiting Instructor at Cornell University Law School and she regularly lectures at the Practicing Law Institute.

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Lucosky Brookman acted as U.S. corporate and securities legal counsel to the Company.
CEO, Jordan Fried, rang the NEO bell to list their blockchain crypto bitcoin portfolio of breakout blockchain brands on the public market.
With a mission to deliver the value of digital assets to every person around the world, Immutable Holdings is positioned to capitalize on the growth in the cryptocurrency and blockchain eco-system.

"A public listing on the NEO Exchange will enable us to execute upon our aggressive growth strategy," remarked Jordan Fried. "We stand to benefit from greater exposure to the investor community, increased access to capital, enhanced liquidity, and the exceptional level of service for which NEO has become known. This is a true partnership between innovators who are paving the way for the future."

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Healthcare Triangle, Inc. is a leader in the public cloud for Hospitals, Health Systems and Life Sciences. In connection with the offering, the company has received approval to list its Common Stock on The Nasdaq Capital Market, with its Common Stock trading under the symbol “HCTI”.

Lucosky Brookman represented EF Hutton in its capacity as sole book-running manager.

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Lucosky Brookman acted as corporate and securities counsel to the Company, while The Benchmark Company, LLC acted as sole book-running manager for the offering.

The gross proceeds to HeartBeam from the offering, before deducting the underwriting discounts and commissions and offering expenses, are expected to be $16.5 million.

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Lucosky Brookman acted as U.S. corporate and securities counsel to the Company, while Maxim Group LLC acted as a sole book-running manager for the offering. Partner Lawrence Metelitsa exclaimed “Great job to CEO, Vlado Bosanac, the rest of the management team and the attorneys at Lucosky Brookman who led this international, dually listed transaction to completion. Moreover, it is always a pleasure working with the team from Maxim Group LLC acting as sole book-running manager for the Offering. Tremendous accomplishment for all parties involved.”

The ADSs began trading on the Nasdaq Capital Market on November 19, 2021, under the symbol "AHI". The offering was closed on November 23, 2021.

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The gross proceeds to Ammo, Inc. from the sale, before deducting expenses, were $3,455,500.

The shares of Series A Preferred Stock sold by Ammo, Inc. has been registered pursuant to a registration statement on Form S-3 (File No. 333-253192), which the Securities and Exchange Commission declared effective on February 24, 2021. A final prospectus supplement and accompanying base prospectus relating to the offering were filed with the Commission on May 25, 2021.

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Lucosky Brookman acted as corporate and securities legal counsel to the Company.

“We are very pleased to have completed this debt transaction with B. Riley Principal Investments. We believe this transaction is a strong validation of LifeMD’s telehealth platform and our continued investment in growth,” noted Marc Benathen, CFO of LifeMD. “As we noted previously, our management team has remained very focused on bolstering our balance sheet to support our aggressive growth strategy and pathway to profitability while doing so with the best interests of our shareholders in mind. By completing this debt financing, LifeMD not only enhances the cash on the balance sheet but forms a key partnership with a tremendous institution with strong capital markets capabilities and deep relationships in the space.”

"B Riley’s Principal Investment team uses the firm’s proprietary capital to make direct investments in companies with proven platform technologies with significant near-term growth potential,” noted Bryant Riley, Chairman and CEO of B. Riley. “We believe that LifeMD fits this profile and we are committed to leveraging the full power of our banking platform and network to support the growth of LifeMD.”

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In connection with the private placement, the Company is issuing to the investor Series A warrants to purchase up to 2,000,000 shares of common stock and Series B warrants to purchase up to 2,000,000 shares of common stock. The Series A and Series B warrants have an exercise price of $17.50 and the Series A warrants are exercisable for four years following the date of issuance and the Series B warrants are exercisable for two years following the date of issuance.

The Series B warrants are not exercisable until vesting under certain conditions. The Company has the right to call the Series A and Series B warrants, subject to the satisfaction of certain conditions.

Maxim Group LLC acted as the sole placement agent in connection with the offering.

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"The team at NeuroOne has worked relentlessly for the past four years to position the company to accomplish this major milestone," NeuroOne CEO Dave Rosa said. "NASDAQ has an established reputation for being an exchange associated with emerging growth stocks, and we believe our uplisting will elevate the company's corporate profile with current and prospective investors, and the financial community as a whole."

"As the company continues to grow, we are hopeful our Nasdaq uplisting will generate even greater interest in our company from leading institutional investment firms across the broader national and international investment community."

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The Firm is pleased to announce that it has added Sam Blatnick as a partner in the Firm's Commercial Litigation Group. Sam's broad experience in complex commercial litigation further expands the Firm's ability and scope to serve its clients.

Prior to joining Lucosky Brookman, Sam had a long career at Cravath, Swaine & Moore, LLP and Kirkland & Ellis LLP, where he practiced for 10 years as a senior attorney and partner. Sam is a highly experienced commercial litigator and seasoned trial attorney. He routinely represents clients in a wide range of complex commercial litigation matters, including contract disputes, terminations of business relationships, corporate governance disputes, restrictive covenants, IP infringement, corporate misappropriation, and bankruptcy claims.

For further information, please see his biography page - https://www.lucbro.com/our-professionals/member/8978/sam-blatnick