



Middle Market Investors

Founded in 1970

Business Services sector specialists

88 Platform Investments totaling just under **\$2.9B of Capital Invested**

Seeking new platform investments in businesses with **\$5M-\$25M EBITDA**

Business Services Sectors

- Utility & Infrastructure Services
- Commercial Facility Services
- Residential Services
- Transportation & Logistics
- Outsourced Professional Services
- Digital Marketing Services
- Value Added Distributors
- Environmental Services
- IT Services
- Software & Tech-Enabled Services
- Insurance & Financial Services
- Compliance & Risk Management

Platform Investment Focused Searches:

- Education/Training & Licensing
- Outsourced Accounting, HR, Payroll Services
- Commercial MEP Services
- Distributed Asset Management Services
- Gas/Electric Utility Maintenance & Repair
- Medical Device MRO
- Architectural Services
- Facility Access Control Services

TEAM

Partners

John Compall
Marc McManus
Chris Perry
Doug Potters
Scott Schwartz
Sloan Wilson
J.D. Wright

Principals & VPs

Peter Fox
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Portfolio Companies Considering Add-On Acquisitions



DIGITAL MARKETING SERVICES

Data-driven, integrated digital marketing services provider.



IT SERVICES Provider of digital engineering and outsourced software development services.



COMMERCIAL FACILITY SERVICES

Provider of industrial refrigeration system maintenance, repair, design, and parts distribution.

FINANCIAL SERVICES Independent, hybrid registered investment advisor providing comprehensive wealth management services.



RESIDENTIAL SERVICES Integrated property management and associated residential services platform focused on HOAs and condo associations.



INSURANCE SERVICES

Insurance brokerage focused on commercial P&C, employee benefits, and personal lines.



COMMERCIAL FACILITY SERVICES Leading provider of remote video monitoring and crime prevention services.



UTILITY & INFRASTRUCTURE SERVICES Provider of infrastructure design, engineering and consulting services across transportation, water, municipal advisory, broadband and land development end markets.



IT SERVICES Value-added reseller offering a wide range of wired and wireless products for the IoT market and related engineering and provisioning services.



IT SERVICES Provider of cyber security services focused on identity security, including access management, identity governance, and privileged account management.



SOFTWARE & TECH-ENABLED SERVICES, COMPLIANCE & RISK MANAGEMENT Leading provider of environmental, health and safety software for high-risk industries.



COMMERCIAL FACILITY SERVICES Provider of renovation and restoration services to multi-family properties.



INSURANCE SERVICES Leading insurance brokerage and MGA focused on commercial and specialty personal lines.



INSURANCE SERVICES Provider of damage assessment, cost estimating, forensic engineering, and construction project management services to insurance carriers and claims services firms.



IT SERVICES Leading data managed services provider offering database management, data and analytics, and application implementation, development and support services.



IT SERVICES Cloud-focused Oracle implementation and managed services provider.



SOFTWARE & TECH-ENABLED SERVICES Provider of tech-enabled survey and sampling data services for market research agencies, consulting firms, and corporations.



IT SERVICES Provider of managed services and technology consulting focused on enterprise clients' mission critical-technology infrastructure.



SOFTWARE & TECH-ENABLED SERVICES, COMPLIANCE & RISK MANAGEMENT Leading provider of compliance software and services to the automotive vertical.



TRANSPORTATION & LOGISTICS Technology-enabled freight broker offering a full suite of services including refrigerated, dry van, power only, drop trailer, and cross border solutions.



INSURANCE SERVICES Insurance brokerage and MGA focused on commercial insurance for the not-for-profit and human services sectors.



CONNECTED TV ("CTV") MARKETING MANAGED SERVICES provider that delivers audience-centric campaigns to connected TVs and other streaming devices.