



# Middle Market Investors

Founded in 1970

**Business Services** sector specialists

**89 Platform Investments** totaling approximately **\$3.0B 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
- Insurance & Financial Services
- Compliance & Risk Management

## Platform Investment Focused Searches:

- Legal Services
- Outsourced Accounting, HR, Payroll Services
- Commercial MEP Services
- Home Improvement Services
- Vacation Rental Management
- Medical Device MRO
- Tree Care Services
- Paving & Asphalt Maintenance

## TEAM

### Partners

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

### Principals & VPs

Peter Fox  
Michael Jamieson  
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### Business Development

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## Portfolio Companies Considering Add-On Acquisitions



### IT SERVICES

Provider of IP-led and strategic AI, data and engineering services.



### COMMERCIAL FACILITY SERVICES

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



**WEALTH MANAGEMENT** 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.



### IT SERVICES

Leading provider of AI, data engineering and application managed and professional services.



### COMMERCIAL FACILITY SERVICES

Leading provider of remote video monitoring and crime prevention services.



**IT SERVICES** Cloud-focused Oracle implementation and managed services provider focused on the public sector, education and regulated industries.



### UTILITY & INFRASTRUCTURE SERVICES

Provides infrastructure design, engineering and consulting services for transportation, water, municipal advisory, broadband and land development end markets.



**PROFESSIONAL SERVICES** Provider of tech-enabled survey and sampling data services for market research agencies, consulting firms, and corporations.



### 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 managed services and technology consulting focused on mid-market and enterprise clients' mission critical technology infrastructure.



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



### COMPLIANCE & RISK MANAGEMENT

Leading provider of compliance software and services to the automotive vertical.



### PROFESSIONAL SERVICES

Leading provider of critical litigation support services.



### COMPLIANCE & RISK MANAGEMENT

Leading provider of environmental, health and safety software for high-risk industries.



### TRANSPORTATION & LOGISTICS

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



### COMMERCIAL FACILITY SERVICES

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



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



### INSURANCE SERVICES

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



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



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