



Middle Market Investors

Founded in 1970

Business Services sector specialists

91 Platform Investments totaling over **\$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
Brian James
Steve LaFrance
Alex Lieberman
Drew Neils
Andrew Roche

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.



UTILITY & INFRASTRUCTURE SERVICES Provider of integrated architecture and multi-disciplinary engineering services.



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.