



Direct Investing for Family Offices

We partner with family offices to make and manage direct equity investments in middle market companies and actively work with management to drive shareholder value creation

PARTNER.

- Family offices and high net worth individuals with a net worth of \$50 million to \$1+ billion
- Management teams and sellers seeking a long-term growth orientated partner that will be an astute steward for the business they have built
- World-class operating partners and highly accomplished industry executives in industries of interest

INVEST.

- Flexible investment horizon, longer than that of a traditional private equity firm
- Long-term perspective allows us to build businesses through the execution of a strategic plan and incremental investment, rather than relying on financial engineering
- Utilize lower levels of leverage, enabling us to support growth in the business and fund strategic investment

GROW.

- Value the knowledge and experience of incumbent owners and management teams
- Leverage the knowledge and relationships of our family office partners, many of whom are current or former business owners, to create incremental value
- Utilize experienced operating partners to augment, guide or develop portfolio company leadership

Investment Focus



INDUSTRIES & END MARKETS

Industrial:

- ◆ Aerospace & Defense
- ◆ Capital Equipment
- ◆ Electrical Components
- ◆ Material Handling
- ◆ Plastics & Packaging
- ◆ Transportation
- ◆ Value-Added Distribution

Consumer:

- ◆ Branded Products
- ◆ Food Co-packing
- ◆ Food Co-manufacturing
- ◆ Value-Added Distribution



FINANCIAL

- ◆ Equity Investment of \$3 – \$50 million
- ◆ Revenue of \$10 – \$250 million
- ◆ EBITDA up to \$50 million



OPPORTUNITIES

- ◆ Owners looking to exit or obtain liquidity
- ◆ Businesses seeking long-term growth oriented partners
- ◆ Distressed & turnarounds
- ◆ Corporate divestitures





Proos Manufacturing

Grand Rapids, MI

Platform: August 2020

Proos is a leading designer and fabricator of highly engineered chutes, shelving and workstation solutions for the material handling and e-commerce industries



Modineer Co.

Niles, MI

Platform: November 2018 | Addon: January 2020

Modineer is a leading manufacturer and fabricator of complex metal components and assemblies for the automotive, military, truck/trailer and industrial markets



Impact Molding

Elkhart, IN

Platform: December 2017 | Addon: May 2018

Impact Molding is a value-added designer, manufacturer and marketer of injection molded products for the consumer and industrial markets



Peeled Snacks

Cumberland, RI

Investment: April 2014 | May 2015

Branded, premium organic snack company with a significant presence in leading natural and traditional grocers, airport retail locations and online retail



F&B Mfg.

Phoenix, AZ

Platform: May 2011 | Addon: June 2012

F&B Manufacturing is a leading provider of highly specialized, precision component parts and sheet metal sub-assemblies for the aerospace, automotive, power generation and semi-conductor industries



Metal Impact

Elk Grove Village, IL

Platform: January 2010 | Addon: May 2015

Metal Impact is an aluminum impact extruder serving the automotive, medical, military/defense, aerospace, consumer products, and agricultural equipment industries

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