

# SOUTHFIELD

## True Partners

Southfield Capital is a private equity firm that partners with exceptional, growing companies in the lower middle market

**Andy Levison**  
Founder & Managing Partner  
[alevison@southfieldcapital.com](mailto:alevison@southfieldcapital.com)

**Andy Cook**  
Partner  
[acook@southfieldcapital.com](mailto:acook@southfieldcapital.com)

**Heb James**  
Partner  
[hjames@southfieldcapital.com](mailto:hjames@southfieldcapital.com)

**Brandon Pinderhughes**  
Partner  
[bpinderhughes@southfieldcapital.com](mailto:bpinderhughes@southfieldcapital.com)

**Robert Root**  
Transformation Partner  
[root@southfieldcapital.com](mailto:root@southfieldcapital.com)

**Tim Lewis**  
Senior Advisor  
[tlewis@southfieldcapital.com](mailto:tlewis@southfieldcapital.com)

**Chris Grambling**  
Principal  
[cgrambling@southfieldcapital.com](mailto:cgrambling@southfieldcapital.com)

**Jason Perloth**  
Principal, Head of Business Development  
[jperloth@southfieldcapital.com](mailto:jperloth@southfieldcapital.com)

**Josh Sylvan**  
Vice President  
[jsylvan@southfieldcapital.com](mailto:jsylvan@southfieldcapital.com)

**Matt King**  
Vice President  
[mking@southfieldcapital.com](mailto:mking@southfieldcapital.com)

**Mike Weber**  
Senior Associate  
[mweber@southfieldcapital.com](mailto:mweber@southfieldcapital.com)

**Alice Esmerian**  
Associate  
[aesmerian@southfieldcapital.com](mailto:aesmerian@southfieldcapital.com)

**Joseph Mitrani**  
Associate  
[jmitrani@southfieldcapital.com](mailto:jmitrani@southfieldcapital.com)

Southfield Capital has invested in entrepreneur built, business services companies since 2002. We work collaboratively with management teams to accelerate organic growth and implement targeted add-on acquisition strategies with the goal of at least tripling the size of the businesses. Having raised more than \$1 billion across five vehicles, Southfield is currently investing out of its third flagship fund.

### Investment Criteria & Focus

#### EBITDA Criteria

**\$4 - 15MM**

*Add-on acquisitions  
can be smaller*

#### Industry Focus

**Business  
Services**

#### Investment Size

**\$20 - 80MM**

**per platform**

*Add-on acquisitions  
can be smaller*



**Partnership-first model  
and strong alignment with  
leadership**



**Profitable,  
growing  
business**



**First  
institutional  
capital**



**Non-discretionary  
services that are critical  
to the customer**



**3x+ organic and  
acquisition growth  
potential**



**Opportunity for  
value creation**

#### Greenwich, CT (HQ)

140 Greenwich Avenue, 4th Floor  
Greenwich, CT 06830

#### Bellevue, WA

13555 S.E. 36th St., Suite 100  
Bellevue, WA 98006

#### For more information or investment opportunities:

Jason Perloth or  
[www.southfieldcapital.com](http://www.southfieldcapital.com)

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## Current Equity Investments



**Alba Wheels Up**  
Logistics Services  
Valley Stream, New York

Alba provides customs brokerage, freight forwarding, trade compliance and other logistics services enabling its clients to efficiently move goods into and out of the U.S.

**Add-on Acquisition Strategy: customs brokerage, freight forwarding, trade and regulatory compliance and related logistics services companies**



**Franchise FastLane**  
Managed Franchise  
Services  
Omaha, Nebraska

Franchise FastLane is a franchise sales organization that provides high value services to emerging franchisors through its proprietary technology, including franchisee program development, prospect recruitment and qualification, communication and tracking, deal closure and onboarding.

**Add-on Acquisition Strategy: franchise sales organizations and franchisor/franchisee service businesses**



**The Kelvin Group**  
Industrial Services  
Wilmington, Massachusetts

The Kelvin Group is an industrial refrigeration and HVAC company that provides a broad range of mission critical services, including system design and installation, service, planned maintenance and compliance.

**Add-on Acquisition Strategy: industrial refrigeration, mission critical HVAC and related compliance services companies**



**Milrose Consulting**  
Building and Municipal  
Consulting Services  
New York, New York

Milrose is a leading provider of outsourced compliance solutions that offers a diverse portfolio, including building code and zoning, permit expediting, regulatory filing, special inspections, due diligence, and other services to clients across a variety of sectors such as commercial, retail, multi-family residential, healthcare, life sciences, among others.

**Add-on Acquisition Strategy: building compliance and inspection services companies**



**Pacific Landscape Management**  
Landscaping Services  
Hillsboro, Oregon

Pacific is a leading landscape management company offering a range of maintenance, enhancement and snow/ice services to commercial, industrial and HOA clients in the Pacific Northwest.

**Add-on Acquisition Strategy: providers of commercial landscape maintenance, enhancements, installation, water management and winter storm services located on the West Coast**



**Property Management Holdings**  
Property Management  
Services  
Clearwater, Florida

Property Management Holdings is a full-service property and association management company providing property management, financial / treasury services, and maintenance services for HOAs, condominiums, residential high rises, townhomes, and commercial buildings.

**Add-on Acquisition Strategy: property management companies across the Southeast U.S. and related ancillary service providers to HOA and condo association clients**



**Protos Security**  
Managed Security Services  
Daleville, Virginia

Protos provides security guard and related solutions through its proprietary technology system which enables clients to outsource the administrative burden associated with onboarding, managing and tracking thousands of guards working for dozens of vendors across hundreds of locations.

**Add-on Acquisition Strategy: tech-enabled physical security, contract security guard, video monitoring and access control companies**

## Other Sectors of Interest

**Building & Facility  
Services**

**Industrial Services**

**Professional Services**

**Compliance & Inspection  
Services**

**IT Services**

**Real Estate Services**

**Financial & Insurance  
Services**

**Managed Services**

**Transportation & Logistics**

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