

SOUTHFIELD

True Partners

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

Investment Focus



Partnership-first model and alignment with leadership



Profitable, growing business



First institutional capital



Non-discretionary services that are critical



3x+ organic and acquisition growth potential



Ability to implement AI & tech-enabled value creation solutions

Southfield Capital has focused on control-oriented investments in entrepreneur-built business services companies since 2002. We are dedicated to elevating businesses by providing institutionalized capabilities and processes, utilizing technology and a bespoke AI transformation playbook to redefine value creation for entrepreneurs and management teams. As a technology leader in the lower middle-market, Southfield works collaboratively 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 \$1.5 billion to date, Southfield is currently investing out of its flagship fund, Southfield Capital IV.

Investment Criteria

EBITDA Criteria

\$4 - 20MM

Add-on acquisitions can be smaller

Sector Focus

Business Services

Investment Size

\$20 - 125MM

Add-on acquisitions can be smaller

Example Industries of Interest



Commercial & Facility Services



Financial & Insurance Services



Environmental & Industrial Services



Tech-Enabled Services



Logistics Services



Professional Services

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

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Current Equity Investments



Alba Wheels Up
Logistics Services
Valley Stream, NY

Alba provides customs brokerage, freight forwarding, trade compliance and other logistics services enabling its clients to efficiently move goods into and out of the United States.
Add-on Acquisition Strategy: customs brokerage, freight forwarding, trade and regulatory compliance and related logistics services companies



Business Development Resources (BDR)
Business Coaching Services
Seattle, WA

BDR is a business coaching and training organization providing strategy, accounting and marketing services to field services contractors and distributors.
Add-on Acquisition Strategy: business coaching and training providers in the HVAC services industry and related verticals such as electrical, plumbing, roofing, landscaping and other blue-collar trades



Contextual
AI Solutions Provider
Guilford, CT

Contextual is an AI solutions provider that rapidly deploys cost-effective, enterprise-grade AI solutions for any process, data, AI platform, business operating system, or industry, allowing Contextual to provide virtually any SMB with robust end-to-end work process automation.



Franchise FastLane
Managed Franchise Services
Omaha, NE

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



Kelvin Group
Industrial Facility Services
Wilmington, MA

Kelvin 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



Metric Search
Specialist Search and Human Capital Solutions
Fort Lauderdale, FL

Metric Search is a provider of specialist search services and human capital solutions for niche, high-growth sectors, including life sciences & MedTech, engineering, and data centers.
Add-on Acquisition Strategy: specialized, sector-focused recruiters focused on existing or new niches



Osprey Landscape Group
Landscaping Services
Hillsboro, OR

Osprey is a leading landscape management company offering a range of maintenance, enhancement, and snow/ice services to commercial, industrial, and HOA clients across the United States.
Add-on Acquisition Strategy: providers of commercial landscape maintenance, enhancements, installation and water management services located in the South, West and Southwest U.S.



Property Management Holdings
Property Management Services
Clearwater, FL

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, VA

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 & off-duty officers, video monitoring and access control companies



Total Fleet Solutions (TFS)
Fleet Management Solutions
Perrysburg, OH

TFS is a provider of outsourced material handling fleet management solutions for customers across the United States.
Add-on Acquisition Strategy: racking and automation service providers, on-site fleet maintenance technicians, and warehouse service providers

Senior Investment Professionals

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