

Our Flagship Private Equity team has 27 years of experience creating value in the middle market. Over the years, we have become known for a collaborative approach that often makes us partners of choice to management teams and for our deep industry experience that enables us to confidently navigate opportunities in our target sectors. We combine our extensive knowledge of our target sectors with operational resources to support talented founders, CEOs and management teams in driving and accelerating growth.

FIRMWIDE STATS

120+

Investment Professionals

27-Year

Track Record

12-Year

Average Tenure of MDs

\$24B

Assets Under Management

*Figures as of 9/30/25. Investment team includes Capital Markets, as well as Portfolio Resources (some of whom are consultants, not employees).*

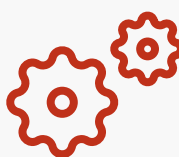
SECTORS OF FOCUS



BUSINESS &  
CONSUMER SERVICES



HEALTHCARE



INDUSTRIAL



TECHNOLOGY &  
TECH INFRASTRUCTURE

INVESTMENT PROFILE

Transaction Types

- Investments to facilitate growth
- First- or second-time institutional capital
- Corporate carve-outs
- Partnership conversions
- Executive-led greenfield platforms
- Transactions involving complexity or structural creativity

Criteria at a Glance

- Control transactions, but open to significant minority investments
- \$150M-\$3B target enterprise value
- Sustainable organic growth
- Programmatic or transformative M&A potential

Senior  
Investment  
Team

Bold = Managing Director

- Drew Appleman
  - Samuel Bekenstein
  - **Ryan Carroll**
  - **Michael Choe**
  - Danielle Cosentino
  - **Bert Duarte**
  - Spencer Friske
  - Jesse Ge
- Andrew Jackman
  - **Andrew Janower**
  - Josh Jaspers
  - **David Katz**
  - Nicole King
  - **Joshua Klevens**
  - Brandon Lapensohn
  - Stephanie Lee
- Jake Lippe
  - Molly Manuel
  - Michael McGuire
  - Brian Pegno
  - Jared Pomerance
  - Caitlin Riederer
  - Mutian Rui
  - Karan Talreja
- Caelin Tran
  - Dan Trunzo
  - **Pedro Vaz**
  - **Brandon White**
  - **Carolyn Wintner**

Business & Consumer Services

BUSINESS SERVICES

- Accordion**  
Financial consulting & analytics
- Aprio**  
Accounting & advisory firm
- CCMC**  
Homeowners association manager
- Lido Advisors**  
Wealth advisory services
- Neptune Retail Solutions**  
Shopper marketing services
- Perspective Financial Group**  
Personal financial management
- Petra Funds Group**  
Fund administration services
- Polyconcept**  
Distributor of custom-branded products
- Rise Growth Partners**  
Synergist partner to RIAs
- Salus GRC**  
Compliance consulting for funds
- StoneCastle Partners**  
Cash management services
- World Insurance Associates**  
Full-service insurance brokerage
- Bankruptcy Management Solutions\***  
Bankruptcy Services
- CIFC\***  
Credit asset management
- Montpelier RE\***  
Property catastrophe insurance
- Princeton Review\***  
Test prep and college counseling
- Vestcom\***  
Shelf-edge marketing solutions
- WorldStrides\***  
Educational student travel

CONSUMER SERVICES

- American Residential Services**  
HVAC and plumbing services
- Bridges Consumer Healthcare**  
OTC healthcare products
- Empire Today**  
Residential flooring solutions
- Front Row Group**  
E-commerce enablement services
- MyEyeDr.**  
Full-service optometry chain
- Reef**  
Beach-inspired sandals and shoes
- Blacksmith Brands\***  
OTC healthcare products
- City Brewery\***  
Beverage contract manufacturing
- FullBeauty Brands\***  
Direct-to-consumer plus-size apparel
- Hearthside Food Solutions\***  
Food contract manufacturing
- Peacock Foods\***  
Food contract manufacturing
- Sound United\***  
Premium home audio and automotive products
- Varsity Brands\***  
Athletic and achievement brands
- Wayfair\***  
E-commerce home goods retailer

Industrial

- BOX Partners**  
Packaging and shipping supplies
- Galls**  
Public safety uniforms and equipment
- Tecomet**  
Medical device and aerospace contract manufacturing
- Velocity One**  
Aerospace and defense solutions
- Cedar Creek\***  
Building products distribution
- Citadel Plastics\***  
Plastics compounding
- GrayWolf Industrial\***  
Services to mechanical industries
- GSI\***  
Agricultural equipment manufacturing
- HDT Global\***  
Engineered military solutions
- OnCore Manufacturing\***  
Contract EMS provider
- Plaskolite\***  
Acrylic sheet manufacturing
- QC Supply\***  
Farm and livestock supply distribution
- Trojan Battery\***  
Deep-cycle battery manufacturing
- United Road Services\***  
Vehicle transport and logistics

Healthcare

- Access Medical Clinic**  
Rural healthcare platform
- Action Behavior Centers**  
Personalized autism therapy
- MB2 Dental**  
Dental partnership organization
- MDVIP**  
Membership-based healthcare
- Animal Health International\***  
Animal health products distribution
- TLC Vision\***  
Eye-care services

Technology

- Aptean**  
ERP software
- Bridgepointe Technologies**  
IT channel platform
- Centegix**  
Tech-enabled safety solutions
- EverDriven Technologies**  
Alternative transportation services
- Ivanti**  
Enterprise IT software
- Park Place Technologies**  
Post-warranty data center equipment maintenance
- Six Degrees**  
Data center and network optimization
- Symplr**  
Healthcare IT software
- Ensono\***  
IT outsourcing
- Zayo\***  
Wholesale fiber bandwidth

\*Realized investment

Note: Includes private equity investments from Funds VI-X, selected to illustrate the different industries and companies in which Charlesbank typically invests

For a complete list of Charlesbank investments, visit [www.charlesbank.com](http://www.charlesbank.com)