

Our Flagship Private Equity team has 28 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

90

Investment Professionals

28-Year

Track Record

13-Year

Average Tenure of MDs

\$21.1B

Assets Under Management

Figures as of 12/31/25. Investment team includes Capital Markets, as well as Portfolio Resources (some of whom are consultants, not employees).

SECTORS OF FOCUS



BUSINESS &
CONSUMER SERVICES



HEALTHCARE



INDUSTRIALS



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
- Molly Manuel
- Michael McGuire
- 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

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

Ventura Community Partners

Community management platform

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

StoneCastle Partners*

Cash management services

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

Industrials

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 & Tech Infrastructure

Aptean

ERP software

Bridgepointe Technologies

IT channel platform

Centegix

Tech-enabled safety solutions

EverDriven Technologies

Alternative transportation services

Ivanti

Enterprise IT software

Six Degrees

Data center and network optimization

Symplr

Healthcare IT software

Ensono*

IT outsourcing

Park Place Technologies*

Post-warranty data center equipment maintenance

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

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