



Investing at the intersection of performance and potential.

Acquisition Criteria

Transaction Types

We focus on opportunities where the seller and team are looking for the right business partner

- Control equity acquisitions
- Management buyouts
- Independent sponsors
- Executive-led searches
- Opportunistic investments in non-control positions

Financial Profile

Platform companies that have the following targeted financial characteristics:

- \$3.0M to \$15.0M FCF
- Strong revenue visibility, with limited customer concentration
- 30.0%+ Gross Profit Margin
- 10.0%+ EBITDA Margin
- Asset light, scalable, and relatively non-cyclical with a history of revenue growth

Target Characteristics

We focus on companies where we can help management accelerate growth

- Succession stories
- Founder-led/Family-owned
- Low transition risk
- Consolidation plays
- Identifiable value creation levers
- US-/Canada-based businesses

Healthcare Services

Select sub-sectors

- Elderly care and services
- Primary care and dentistry
- Mental health
- Women's health
- Revenue cycle management, staffing, and other support services

Business Services

Select sub-sectors

- Business-to-Business
- Legal services
- Logistics
- Maintenance, repair, overhaul
- Advisory/Engineering

Specialty/Value-Added Manufacturing

Select sub-sectors

- Prototyping
- Specialty packaging
- Short-run/medium-run production focused models
- Value-added manufacturing – design and engineering focused

Enthusiast Products/Services

Select sub-sectors

- Passion-driven products and services
- Professional/semi-professional end-markets
- Active lifestyle brands
- Self-identification products and services

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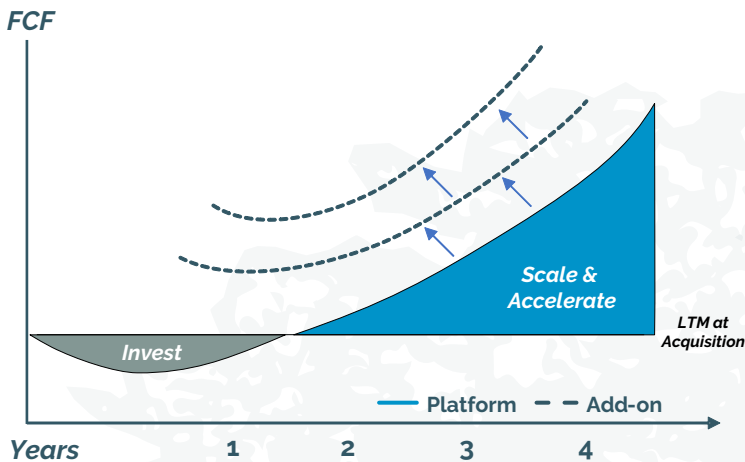
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We seek opportunities where we can create value through tech-enablement and digital adaptation of lower middle-market companies with a buy-and-build focus supplementing established PE value creation methodologies.

Buy-and-Build Investment Model



Value Creation Playbook



Systems & Technology

Implement off-the-shelf technologies to improve operational efficiency and effectiveness



People

Build out the C-suite, management leadership, and the organization to create and sustain a winning culture of success



Cost Management

Constantly question the value of budgeted expense items – while many middle-market companies run lean, we regularly review the ROI of budgeted expense items



Digital Adaptation

Implement tools and strategies to better target, reach, and serve customers

Team



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