

# Firm Overview

Altamont Capital Partners is a private equity firm with over \$4 billion of capital under management, focused primarily on making long term, control investments in middle market businesses. We partner with management teams to transform strong companies into scaled, resilient platforms. This partnership is built on shared goals, mutual trust, and a genuine commitment to building something lasting together.

53

Investments

31

Realizations

\$4B+

Capital Under Management

## COMPANY SIZE

- Platforms: Up to \$50M EBITDA
- Add-Ons: \$0.5M+ EBITDA

## EQUITY INVESTMENT

- \$15M to \$150M+

## TRANSACTION TYPES

- Flexible structure to fit the situation
- Long-term investment horizon
- Deep familiarity with family, founder, and employee-owned businesses, as well as corporate carve-outs and platform builds

## INDUSTRIES

### Industrials

- Specialty Distribution
- Packaging
- Niche Manufacturing
- Building Materials

### Business Services

- Specialized Advisory and Technical Services
- Critical Industrial and Facility Services
- Insurance Services

### Financial Services

- Insurance – P&C and Life
- Asset & Wealth Management
- Specialty Finance

**TRANSFORM**  
Build the foundation  
for growth



**SCALE**  
Compound  
the platform

## ALTAMONT ASCEND

Our repeatable system for platform building – bringing together functional experts, an executive network and sector-specific playbooks that help transform and scale our portfolio companies.

10+ Functional Experts

40+ Operating Partners & Executives

## BUSINESS DEVELOPMENT & CAPITAL MARKETS

### Kristin Johnson

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### Ariail Barker

Director of Business Development  
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### Pete Meyerdirk

Managing Director of Capital Markets  
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### Andrew Kocins

Vice President of Business Development & Capital Markets  
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## INVESTMENT TEAM

Randall Eason | Keoni Schwartz | Chase Beeler | Sam Gaynor

Kevin Mason | Wande Olabisi | Jun Liang | James Allen | Jiahui Hu

Shriya Iyer | Riley Quinn | Matt Sonnenblick | Andrew Summerville






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# Portfolio Companies






## Current Focus Sectors



### INDUSTRIALS

-  Leading provider of specialty and custom corrugated packaging products (Feb-26)
-  Manufacturer of custom-engineered fabric structures (Feb-24)
-  Market leading distributor and fabricator of "below-the-hook" lifting solutions (Feb-22)
-  Value-added distributor of connected home, audio/video and residential security products (Mar-21)
-  Vertically-integrated provider of protective packaging products (Dec-20)

### FRANCHISING & MULTI-UNIT

-  Largest Taco Bell franchisee and growing 7 Brew franchisee, located in the Southeast (Continuation Fund: Aug-24 | Initial Investment: Dec-12)
-  Premium beaded frozen novelty manufacturer and brand (Nov-23)
-  Scratch-made Southern food restaurant chain (Feb-15)




### CONSUMER\*

-  Direct seller of whole food-based nutritional products (Nov-18)
-  Leading full-service design, sourcing, and apparel distributor (Dec-14)

### FINANCIAL SERVICES

-  Hybrid insurance carrier providing technology, services, and balance sheet capital capacity to managing general underwriters (Oct-23)
-  Reinsurance brokerage providing innovative capital solutions for P&C carriers (Jul-23)
-  Capital solutions provider focused on reinsurance offerings for small/mid-sized P&C companies across the US, Bermuda, and Europe / UK (May-22)
-  Asset management platform providing modern goals-based investment solutions to financial advisors (Nov-21)
-  Floorplan finance platform, serving independent auto dealers (Nov-20)
-  Vertically-integrated commercial lines insurance platform focused on the US and UK/EU markets (IPO: Jul-25 | Initial Investment: Feb-19)
-  Middle market life & annuity insurance platform (Oct-16)
-  Full-service managing general agency platform (Dec-15)

### BUSINESS SERVICES

-  Provider of claims adjusting and administration services, specializing in the complex SME commercial casualty insurance market (Dec-25)
-  Leading provider of eco-friendly, waste management services for food processors and retailers (Aug-22)
-  Leading provider of pipeline coatings and insulation solutions (Sep-18)

### HEALTHCARE\*

-  Provider of behavioral health services to children and adults (Sep-17)

\*Note: No longer actively investing in healthcare and consumer sectors. Pursuing new franchisee opportunities via Tacala platform.

## Exited Portfolio Companies

