

Our Approach

Specialization

Industry vertical teams bring true domain expertise

Thematic

Target subsectors based on relevant investment themes and trends

Operators

Operational enhancement via 19 industry and functional experts

Value Creation

Systematic approach to creating market leaders

Partner of Choice

Approx. 80% of investments entrepreneur-owned and operated at close

120+ investments completed and \$2.6B capital raised and managed since inception

Investment Criteria

Preference for entrepreneur-owned businesses

Ownership	> 50%
Location	North America
EBITDA	\$4MM to \$35MM
Equity Investment	\$40MM to \$225MM
Financial Profile	Asset-efficient, high growth

Investment Opportunities



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Select Healthcare Portfolio Companies

Add-On Criteria

	October 2025	Franchisor of in-home senior care services, including personal care, skilled home health and assisted living placement	Complementary franchisor businesses that serve seniors along the continuum of care
	April 2025	Nationwide provider of ABA therapy for children in both homes and clinics	Complementary, tuck-in ABA providers
	December 2021	Food services provider to hospitals, senior care and educational facilities	Food service providers & senior meals/nutrition businesses
	November 2021	Marketing services provider to the biopharma sector	Pharma marketing and medical communications
	April 2018; exited January 2025	Nationwide franchisor of non-medical, in-home services	
	February 2018	Multidisciplinary interventional pain management services	Pain management practices
	March 2017	RCM solutions for hospitals and healthcare providers	RCM solutions
	Oct 2018; exited September 2022	Clinic-based provider of ABA therapy for full-time care of autistic children	

Themes and Targeted Sub-Sectors

» Aging Independently

- Hospice / Home health
- Hospital in the home
- Meal delivery
- Personal care

» Healthcare IT

- Healthcare digitization
- Care management / Navigation
- Patient engagement

» Pharma Services

- Clinical trial services
- Infusion
- Medical communications
- Pharma marketing

» Increased Demand for Behavioral Health

- Autism
- Mental health / Substance use disorders

» Targeting of Specific Diseases & Conditions

- Cardiology
- Fertility
- Pain management / Physical therapy
- Regenerative medicine
- Urology
- Wound care

» Healthcare Consumerism

- Concierge medicine
- Medspa / Cosmetic surgery
- Vet
- Wellness

» Reducing Costs & Promoting Better Outcomes

- Outsourced services
- Pharmacy services
- Social determinants of health
- Staffing

Healthcare Team



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Steve Rodgers Healthcare Services

CEO, Accent Care; Founder, OptumCare; Senior Executive, UnitedHealth Group; Medic, U.S. Army



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