

DEAL CRITERIA

Revenue	\$2M – \$6M
Cash Flow (SDE)	\$500K – \$5M
Location	Midwest, Remote

B2B or B2C service businesses with recurring revenue and relationship-driven renewals — where a loyal customer base exists but hasn't been systematically retained or grown.

TARGET INDUSTRIES

B2C & B2B Professional Services

Cleaning/Custodial Services, Lawn Care, Educational Services, Space-as-a-Service, Digital Marketing, Consumer Goods Maintenance/Repair, Business Support Services

Don't see your industry? We still want to talk to you.

EXPERIENCE

20+ years building customer systems at scale.



EDUCATION

University of Chicago
Booth School of Business
MBA

University of Michigan
Ross School of Business
BBA

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ACQUISITION THESIS

I acquire profitable service businesses with loyal customer bases — and install the retention and revenue systems that unlock compounding growth, without changing what makes them great.

I've spent 20+ years doing exactly this at Amazon, StockX, and GoFundMe. Now I want to do it for one business I own and operate directly.

WHAT I BRING BEYOND CAPITAL

- ❖ **Customer retention systems** — Took StockX's returns-as-churn rate from 17% to 6.9% in 12 months.
- ❖ **CRM and lifecycle marketing** — Managed 500M+ customer messages annually, building triggers and journeys that drive measurable revenue.
- ❖ **KPI and operating cadence** — I build the measurement layer most owner-operated businesses lack, then use it to make faster, better decisions.
- ❖ **Team building and GM development** — I hire great operators, give them real authority, and focus on strategy, growth, and talent.

WHAT SELLERS CAN EXPECT

- ❖ Confidentiality and discretion at every stage of the process.
- ❖ A straightforward structure — seller notes, defined transition plans, retention packages for key managers. No unnecessary complexity.
- ❖ Genuine respect for what you've built — not a flipper. Looking for a business to grow and be proud of for the long term.
- ❖ A well-capitalized buyer with SBA financing in place and a clear path to close.