



# Montera Investment Group

## About Us

Montera Investment Group (“Montera”) is a mission-driven holding company that partners with family owned businesses for the long term. We deploy patient capital and offer insights and resources, complemented by our deep network of relationships to position companies for maximum success.

## Investment Criteria

Montera seeks to make control investments in growth-oriented North American based businesses which have the following characteristics:

- Founder or owner-operated
- \$2M+ of EBITDA or owner benefit
- 5+ years of profitability
- A committed, enthusiastic management team
- Great commercial and community reputation

## Industry Expertise

We invest in the following industries:

### Consumer

- Health & Wellness
- Restaurants
- Food & Beverage
- Household Goods
- Ecommerce

### Services

- Commercial & residential services
- Tech-enabled services
- Knowledge Services
- Human capital management

### Real Estate

- Commercial and residential property management

## Particular Focus Investing in Family Owned Businesses

We are committed to partnering with family owned businesses. We provide owners with solutions to ownership transition, capital needs and, if necessary, succession planning. In situations requiring a successor who is not already in place, we turn to our deep network of expert relationships to find the right management resources. We value the experience and continued involvement of family owners and we are flexible in how we structure a transaction to ultimately meet their needs.

### **Kareem Mahmoud**

Founder & CEO

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