

# Creative Capital Solutions in Complex Markets

DRIVEN BY CREATIVITY, DIVERSITY, AND UNPARALLELED EXPERTISE

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## About Us

Turning Rock seeks to make long-term investments in debt and equity securities of North American small and mid-capitalization businesses. The Firm believes there is a growing supply of illiquid assets for sale in the market driven by a challenging macroeconomic environment, ongoing volatility, global bank deleveraging and increased complexity. The investment strategy seeks to fill the void that has been created by the current regulatory environment as banks have stepped away from acquiring and lending against more illiquid types of assets.

- ➔ Value-Orientation
- ➔ Differentiated Sourcing
- ➔ Bespoke Capital Solutions
- ➔ Creative Structuring
- ➔ Flexible Mandate
- ➔ Path to Liquidity

# The Turning Rock Principles

Turning Rock adopts the following principles and objectives to guide its investment strategy:

## Build

A diversified portfolio of attractive risk-adjusted investments

## Preserve

Our partner's capital

## Maximize

Total return to investors within stated risk parameters

## Diversity, Preservation, & Maximized Returns

Our approach is informed by a combination of top-down capital markets knowledge, paired with fundamental equity and credit analysis. Integral in this process is the constant intellectual challenge and review of current markets. Turning Rock constructs its portfolio to offer equity-style returns with downside protection over multiple market cycles. We emphasize return of principal and inherent cash flow throughout portfolio construction and employ time-tested

credit and equity research, while performing deep dive analytics on each potential investment through a combination of financial, operational, and qualitative analysis.

## Our Team

Diverse investment solutions from a diverse team of experts

Turning Rock's team is composed of highly-skilled investment, operational, and administrative professionals from a wide range of backgrounds. We are proud of our team's heritage and combined skill sets.



Maggie Arvedlund  
Managing Partner

David Markus, CFA  
Partner

Saba Ahmad  
COO / CFO / Partner



Louis Mayer  
Vice President

Stephen Spataro, CPA  
Controller

Rima Roy  
Administration / Client Service

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## Our Impact Objective

- Donation of percentage of firm profits to mission-driven organizations which promote diversity
- Participation in programs which are government sponsored for women or minority owned participants
- Productive & socially minded workforce



## Social Responsibility

- Maintain guidelines for our own internal framework include elements of social responsibility
- Pledge to consider environmental, public health, safety, and social issues with potential investments
- Evaluate level of transparency across its portfolio and reviews underlying ESG policies in place at its underlying investments

## Diversity Initiatives

- Commitment to diversity within Senior Executive/Management level as well as full staff
- General partnership structure reflect this culture of competitive wages & benefits to all employees
- Diversity of thought welcomed & fostering of a unique skill set across the organization
- Firm culture built on collaboration, integrity & creativity

We're a minority and women-owned business enterprise based in New York



# Contact Us

We seek to build and partner with experienced management teams in order to create and unlock long-term shareholder value, and we hope that the teams we work with find Turning Rock to be a partnership with staying power.

Have a question?  
**Call us at +1 212 207 2390**

Your name	Your e-mail
Subject	
Message	

SEND A MESSAGE

We are located at 400 Park Avenue, Suite 610, NY 10022, see map below for more.



