

FOR FAMILIES WHO'VE BUILT SOMETHING WORTH PROTECTING

Protecting the Legacy. Preparing the Next Generation.

You built something rare. Peak makes sure it outlasts you — with the right people in place, a structure that holds under pressure, and a next generation genuinely ready to lead it. We step in where it matters most, and step out once your family can carry it without us.

We've stabilized operating companies, rebuilt governance, and prepared successors across industries — always in the background, always with absolute discretion.

WHERE FAMILIES GET STUCK

- **Every holding has your name on it.**
There's no portfolio of fifty bets to absorb a bad one — each investment has to perform.
- **Talent isn't the same as readiness.**
The next generation may be sharp, even brilliant. That's not the same as being ready to lead.
- **You're doing a team's job alone.**
Two or three people are quietly carrying what an operating team of twenty would normally handle.
- **Loyalty can outlast usefulness.**
The people who got you here aren't always the ones who get you through what's next.

WHERE PEAK STEPS IN

- **We tell you what no one else will.**
A clear-eyed look at who's actually in your corner — and who's just been there a long time.
- **We build leaders, not understudies.**
Your next generation works alongside our operators and learns to decide, not just observe.
- **We carry what's draining you.**
Embedded leadership across your holdings, with plain, honest updates — when and where you need them.
- **Discretion isn't a policy here.**
It's the only way we know how to work with a family's name and future on the line.

STRIATED TEAMS TM — THE RIGHT LEADERSHIP, AT THE RIGHT LEVEL

01**STRATEGIC LEADERS**

Board-level decisions, governance, succession, and accountability for outcomes.

02**OPERATIONAL EXECUTORS**

The operators who turn the plan into daily progress and stabilize what's wobbling.

03**TACTICAL SUPPORT**

Extra hands for a single project — in fast, out clean, no disruption.

Families scale us up or down without the friction of hiring, firing, or onboarding.

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We're here to stabilize, strengthen, and prepare — not to stay.

COLLEEN FERRARY, FOUNDER & CEO

**Colleen Ferrary, CEO**

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ABSOLUTE DISCRETION.**MULTI-GENERATIONAL PERSPECTIVE.**