



INDUSTRY UPDATE

BUSINESS SERVICES
Q4 2023

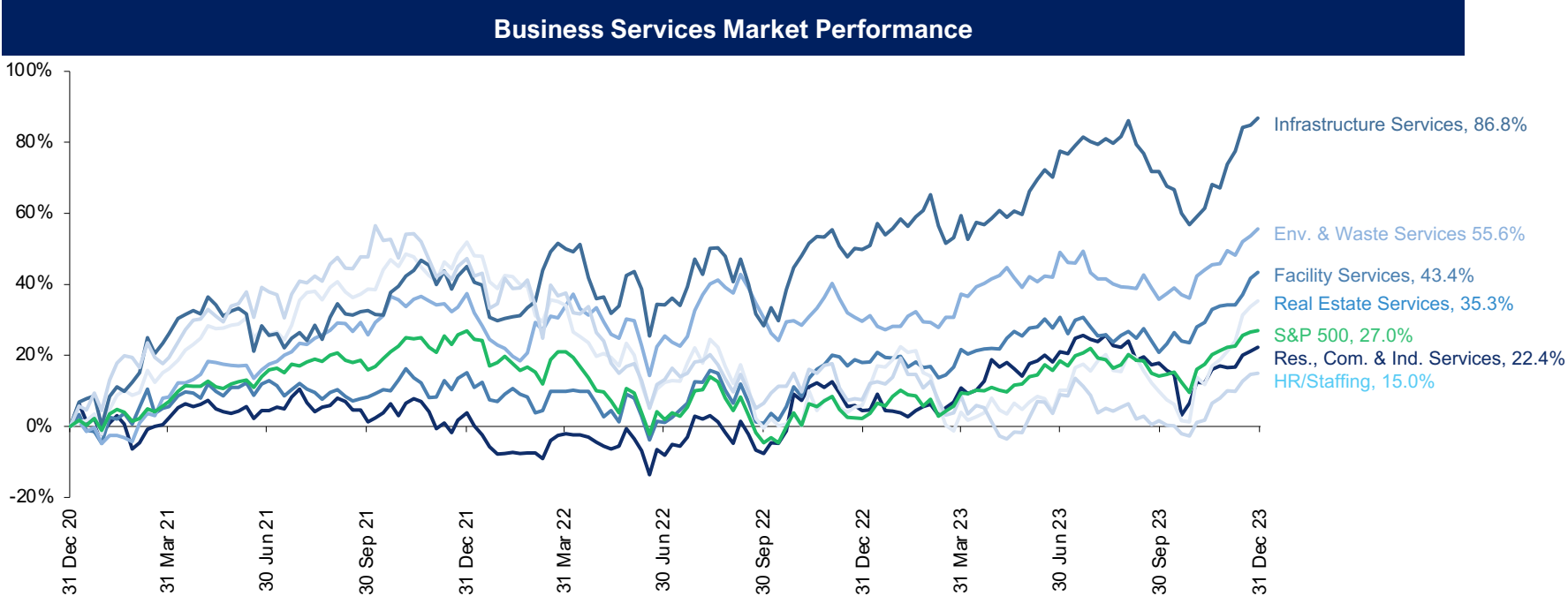


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Public Market Performance

In Q4 2023, public equities across most segments of the Business Services sector performed strong as the broader market rallied towards the end of the year. The Federal Reserve signaled that disinflationary trends were sufficient to project a shift to monetary easing in 2024. Anticipated growth in various Business Services sectors is attributed to increasing confidence in a soft landing, ultimately avoiding a recession. This optimism is further fueled by the nature of many services offered, which are driving essential, non-discretionary spending. On a 3-year period ending December 31, 2023, the S&P 500 has returned 27.0%. Segments such as Infrastructure Services, Environmental & Waste Services, and Facility Services were among the leading performers, returning 86.8%, 55.6%, and 43.4%, respectively.



Source: S&P Capital IQ
Note: All values based on publicly available data as of 12/31/2023



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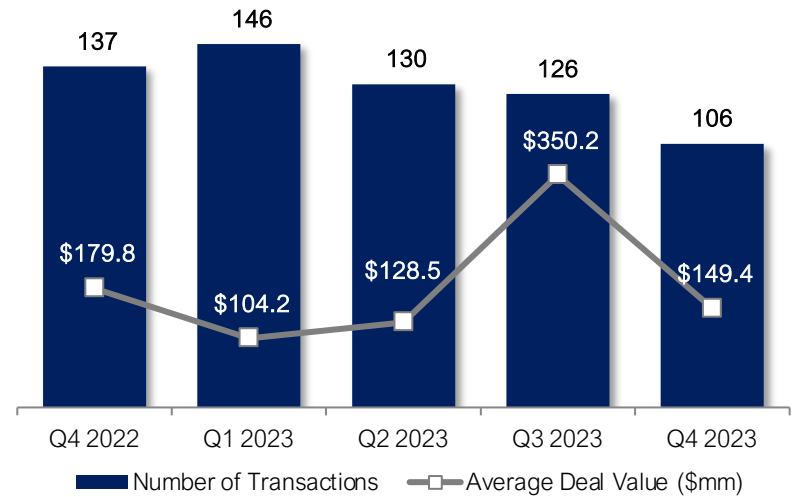
Middle-Market M&A Activity

In Q4 2023, M&A activity within the Business Services sector experienced an overall decline compared to the previous quarter. Average deal value is considered more in line with historic norms as Q3 2023 experienced a few large transactions. Deal volume has declined throughout 2023 as fewer private equity backed exits occurred largely in anticipation of macroeconomic certainty and stronger buyer appetite in 2024.

Strategic buyers (including PE backed) continue to represent the largest percentage of the transactions and have sought acquisitions to expand their service offerings, geographic footprint and continue to aggressively gain market share through consolidation.

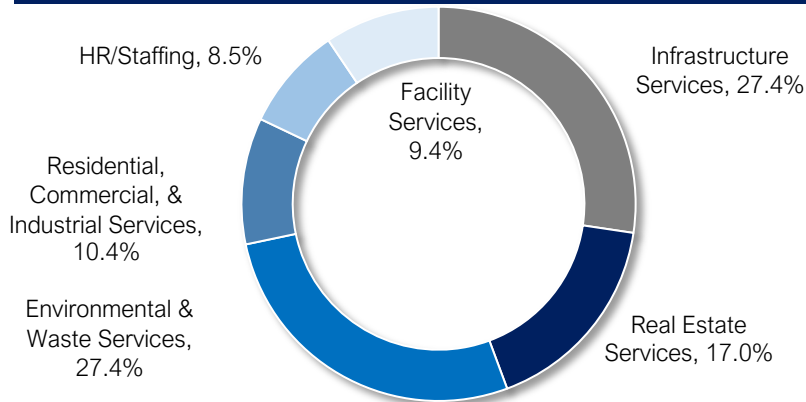
Environmental & Waste Services and Infrastructure Services led activity, both accounting for 27.4% of total Business Services transaction volume as Real Estate Services continue to receive strong interest representing 17.0% of transaction volume for the quarter.

Business Services M&A Activity



*For transactions with reported deal values only

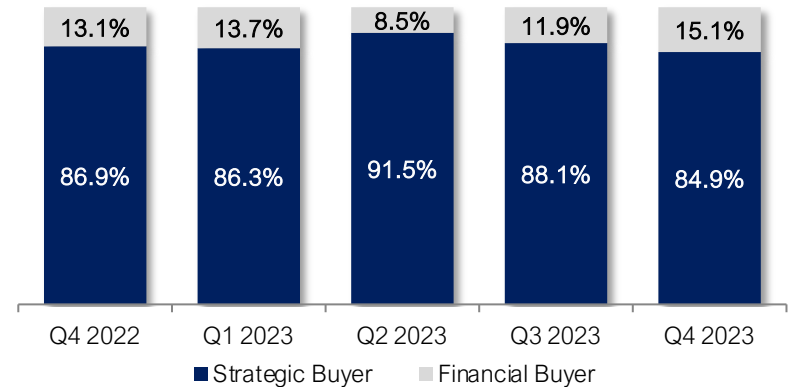
Q4 2023 M&A Activity by Sector



Source: S&P Capital IQ

Note: All values based on publicly available data as of 12/31/2023

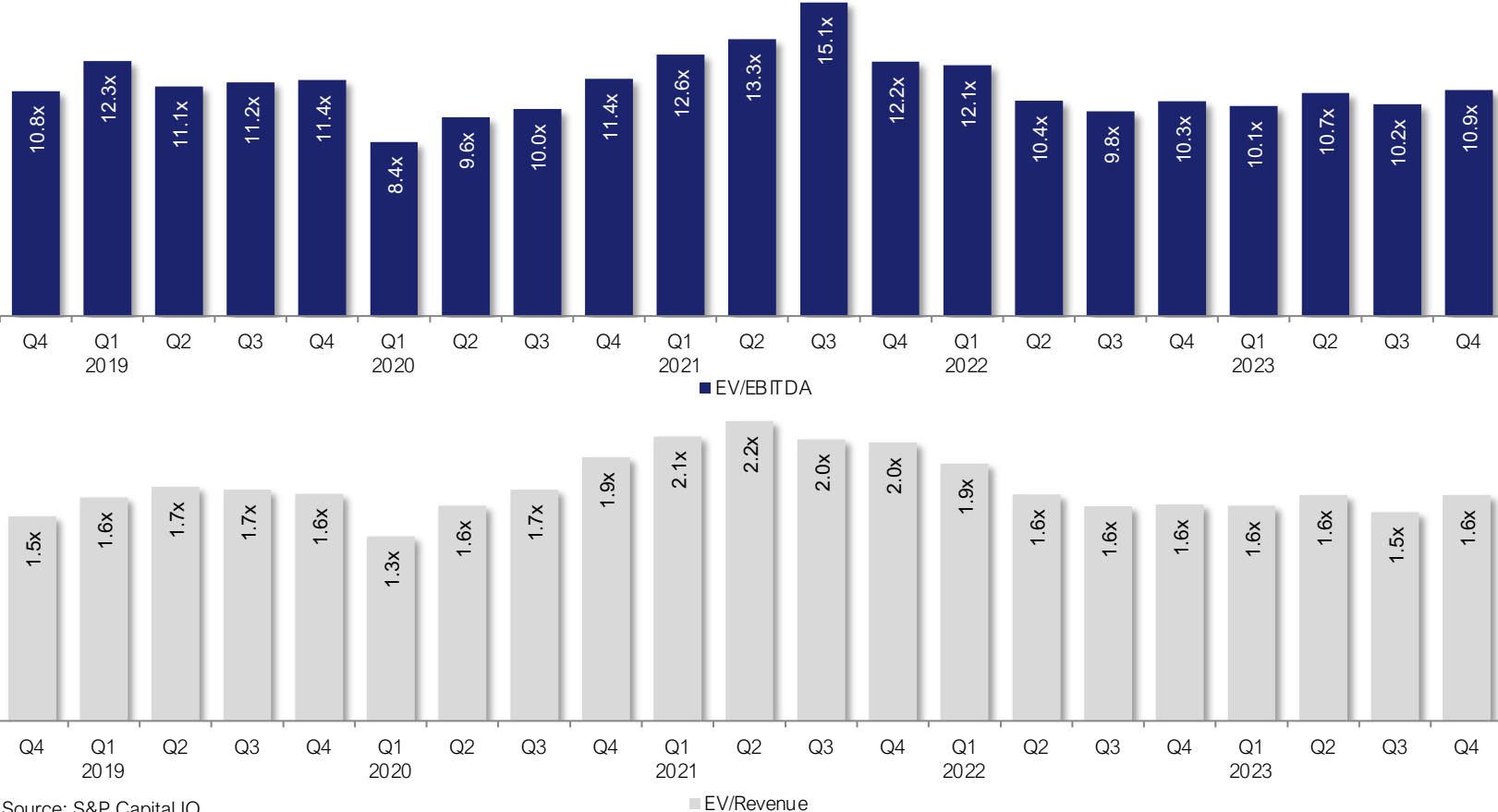
M&A Activity by Buyer Type



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Public Company Trading Multiples

Select publicly traded companies representing the key sectors across the Business Services industry traded at an average multiple of 10.9x EBITDA and 1.6x revenue. Trading multiples varied significantly across and within the six categories, with the strongest multiples observed in the Environmental & Waste Services and Residential, Commercial, and Industrial Services categories with an average EBITDA multiples of 13.9x and 11.8x, respectively.



Source: S&P Capital IQ
 Note: All values based on publicly available data as of 12/31/2023



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Public Comparable Companies

<u>Company Name</u>	<u>Enterprise</u>	<u>Share</u>	<u>Price Change</u>		<u>LTM Margins</u>		<u>TEV / LTM:</u>		
	<u>Value (\$mils)</u>	<u>Stock Price</u>	<u>3 month</u>	<u>12 month</u>	<u>Gross</u>	<u>EBITDA</u>	<u>Revenue</u>	<u>EBITDA</u>	
Residential, Commercial and Industrial Services									
ADT Inc.	\$ 15,653	\$ 6.82	13.7%	(24.8%)	69.5%	41.9%	2.5x	5.9x	
BrightView Holdings, Inc.	\$ 1,744	\$ 8.42	8.6%	22.2%	24.1%	11.2%	0.6x	5.5x	
Comfort Systems USA, Inc.	\$ 7,449	\$ 205.67	20.7%	78.7%	18.4%	10.5%	1.5x	14.3x	
EMCOR Group, Inc.	\$ 10,047	\$ 215.43	2.4%	45.5%	15.9%	9.7%	0.8x	8.5x	
Rentokil Initial plc	\$ 18,317	\$ 5.61	(24.6%)	(8.3%)	66.0%	21.6%	3.0x	13.8x	
Rollins, Inc.	\$ 21,898	\$ 43.67	17.0%	19.5%	52.1%	26.0%	7.3x	28.2x	
Team, Inc.	\$ 355	\$ 6.60	(5.0%)	25.7%	24.7%	6.8%	0.4x	6.1x	
Mean	\$ 10,780	\$ 70.32	4.7%	22.6%	38.7%	18.3%	2.3x	11.8x	
Median	\$ 10,047	\$ 8.42	8.6%	22.2%	24.7%	11.2%	1.5x	8.5x	

Source: S&P Capital IQ

Note: All values based on publicly available data as of 12/31/2023



GCG Business Services Update | Q4 2023

Public Comparable Companies

<u>Company Name</u>	<u>Enterprise</u>	<u>Share</u>	<u>Price Change</u>		<u>LTM Margins</u>		<u>TEV / LTM:</u>		
	<u>Value (\$mils)</u>	<u>Stock Price</u>	<u>3 month</u>	<u>12 month</u>	<u>Gross</u>	<u>EBITDA</u>	<u>Revenue</u>	<u>EBITDA</u>	
Infrastructure Services									
AECOM	\$ 14,355	\$ 92.43	11.3%	8.8%	6.6%	6.2%	1.0x	16.2x	
Dycom Industries, Inc.	\$ 4,382	\$ 115.09	29.3%	23.0%	19.4%	13.1%	1.1x	8.1x	
Fluor Corporation	\$ 5,657	\$ 39.17	6.7%	13.0%	3.5%	4.0%	0.4x	9.1x	
IES Holdings, Inc.	\$ 1,648	\$ 79.22	20.3%	122.7%	18.7%	8.5%	0.7x	8.2x	
Jacobs Solutions Inc.	\$ 19,726	\$ 129.80	(4.9%)	8.1%	21.4%	10.0%	1.2x	12.1x	
KBR, Inc.	\$ 9,126	\$ 55.41	(6.0%)	4.9%	13.8%	14.4%	1.3x	9.2x	
MasTec, Inc.	\$ 9,280	\$ 75.72	5.2%	(11.3%)	12.0%	13.0%	0.8x	6.1x	
MYR Group Inc.	\$ 2,480	\$ 144.63	7.3%	57.1%	10.4%	5.6%	0.7x	12.5x	
NV5 Global, Inc.	\$ 1,992	\$ 111.12	15.5%	(16.0%)	49.6%	15.8%	2.4x	15.1x	
Primoris Services Corporation	\$ 3,022	\$ 33.21	1.5%	51.4%	10.6%	8.3%	0.5x	6.6x	
Stantec Inc.	\$ 10,589	\$ 80.55	23.6%	68.0%	54.4%	15.5%	2.9x	18.2x	
Tutor Perini Corporation	\$ 1,144	\$ 9.10	16.2%	20.5%	1.5%	(2.0%)	0.3x	NM	
Quanta Services, Inc.	\$ 35,303	\$ 215.80	15.4%	51.4%	14.4%	14.5%	1.8x	12.5x	
Mean	\$ 9,131	\$ 90.87	10.9%	30.9%	18.2%	9.8%	1.2x	11.1x	
Median	\$ 5,657	\$ 80.55	11.3%	20.5%	13.8%	10.0%	1.0x	10.7x	

Source: S&P Capital IQ

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GCG Business Services Update | Q4 2023

Public Comparable Companies

<u>Company Name</u>	<u>Enterprise</u>	<u>Share</u>	<u>Price Change</u>		<u>LTM Margins</u>		<u>TEV / LTM:</u>		
	<u>Value (\$mils)</u>	<u>Stock Price</u>	<u>3 month</u>	<u>12 month</u>	<u>Gross</u>	<u>EBITDA</u>	<u>Revenue</u>	<u>EBITDA</u>	
Environmental & Waste Services									
Casella Waste Systems, Inc.	\$ 5,854	\$ 85.46	12.0%	7.8%	34.0%	22.9%	5.0x	21.7x	
Clean Harbors, Inc.	\$ 11,615	\$ 174.51	4.3%	52.9%	30.6%	22.8%	2.2x	9.5x	
GFL Environmental Inc.	\$ 19,870	\$ 34.61	8.6%	18.5%	15.8%	24.0%	3.6x	14.6x	
Enviri Corporation	\$ 2,199	\$ 9.00	24.7%	43.1%	20.5%	17.2%	1.1x	6.4x	
Republic Services, Inc.	\$ 64,001	\$ 164.91	15.7%	27.8%	40.6%	29.4%	4.4x	14.8x	
Stericycle, Inc.	\$ 6,332	\$ 49.56	10.8%	(0.7%)	37.2%	21.8%	2.4x	10.8x	
Waste Connections, Inc.	\$ 45,470	\$ 149.27	11.1%	12.6%	40.3%	31.3%	5.8x	18.5x	
Waste Management, Inc.	\$ 87,433	\$ 179.10	17.5%	14.2%	37.7%	28.9%	4.3x	15.0x	
Mean	\$ 30,347	\$ 105.80	13.1%	22.0%	32.1%	24.8%	3.6x	13.9x	
Median	\$ 15,743	\$ 117.37	11.6%	16.3%	35.6%	23.5%	4.0x	14.7x	

Source: S&P Capital IQ

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GCG Business Services Update | Q4 2023

Public Comparable Companies

<u>Company Name</u>	<u>Enterprise</u>	<u>Share</u>	<u>Price Change</u>		<u>LTM Margins</u>		<u>TEV / LTM:</u>		
	<u>Value (\$mils)</u>	<u>Stock Price</u>	<u>3 month</u>	<u>12 month</u>	<u>Gross</u>	<u>EBITDA</u>	<u>Revenue</u>	<u>EBITDA</u>	
Facility Services									
ABM Industries Incorporated	\$ 4,205	\$ 44.83	12.0%	0.9%	13.9%	6.9%	0.5x	7.5x	
Aramark	\$ 13,931	\$ 28.10	(19.0%)	(32.0%)	16.4%	14.2%	0.7x	5.2x	
Cintas Corporation	\$ 63,860	\$ 602.66	25.3%	33.4%	47.9%	25.0%	6.9x	27.7x	
Compass Group PLC	\$ 51,348	\$ 27.33	12.0%	18.3%	6.6%	8.3%	1.4x	NM	
Healthcare Services Group, Inc.	\$ 708	\$ 10.37	(0.6%)	(13.6%)	11.9%	3.3%	0.4x	12.7x	
Prosegur Compañía de Seguridad, S.A.	\$ 2,792	\$ 1.95	20.4%	2.7%	23.1%	10.6%	0.6x	5.4x	
Securitas AB (publ)	\$ 10,026	\$ 9.80	23.3%	17.5%	20.3%	8.4%	0.7x	7.7x	
SP Plus Corporation	\$ 1,540	\$ 51.25	42.0%	47.6%	28.0%	32.0%	1.8x	5.5x	
UniFirst Corporation	\$ 3,399	\$ 182.91	12.2%	(5.2%)	33.9%	13.1%	1.5x	12.1x	
The Brink's Company	\$ 6,819	\$ 87.95	21.1%	63.7%	24.1%	19.4%	1.4x	7.3x	
Mean	\$ 15,863	\$ 104.72	14.9%	13.3%	22.6%	14.1%	1.6x	10.1x	
Median	\$ 5,512	\$ 36.47	16.3%	10.1%	21.7%	11.8%	1.0x	7.5x	

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GCG Business Services Update | Q4 2023

Public Comparable Companies

<u>Company Name</u>	<u>Enterprise</u>	<u>Share</u>	<u>Price Change</u>		<u>LTM Margins</u>		<u>TEV / LTM:</u>	
	<u>Value (\$mils)</u>	<u>Stock Price</u>	<u>3 month</u>	<u>12 month</u>	<u>Gross</u>	<u>EBITDA</u>	<u>Revenue</u>	<u>EBITDA</u>
Real Estate Services								
Assurant, Inc.	\$ 9,516	\$ 168.49	17.3%	34.7%	9.7%	9.7%	0.9x	9.1x
CBRE Group, Inc.	\$ 33,072	\$ 93.09	26.0%	21.0%	19.7%	6.3%	1.1x	16.8x
Colliers International Group Inc.	\$ 9,107	\$ 126.91	32.7%	38.1%	39.9%	15.8%	2.1x	13.0x
Cushman & Wakefield plc	\$ 5,416	\$ 10.80	41.7%	(13.3%)	17.3%	6.2%	0.6x	9.1x
Fidelity National Financial, Inc.	\$ 15,606	\$ 51.02	23.5%	35.6%	54.7%	15.2%	1.4x	9.4x
First American Financial Corporation	\$ 7,262	\$ 64.44	14.1%	23.1%	60.6%	11.9%	1.2x	9.8x
FirstService Corporation	\$ 8,415	\$ 162.54	11.3%	32.7%	32.1%	10.5%	2.0x	18.3x
Anywhere Real Estate Inc.	\$ 3,947	\$ 8.11	26.1%	26.9%	35.1%	6.1%	0.7x	11.3x
RE/MAX Holdings, Inc.	\$ 160	\$ 13.33	3.0%	(28.5%)	74.2%	27.8%	0.5x	1.7x
Stewart Information Services Corporation	\$ 2,010	\$ 58.75	34.1%	37.5%	60.0%	8.8%	0.9x	9.8x
Mean	\$ 9,451	\$ 75.75	23.0%	20.8%	40.3%	11.8%	1.1x	10.8x
Median	\$ 7,838	\$ 61.60	24.8%	29.8%	37.5%	10.1%	1.0x	9.8x

Source: S&P Capital IQ

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GCG Business Services Update | Q4 2023

Public Comparable Companies

Company Name	Enterprise	Share	Price Change		LTM Margins		TEV / LTM:		
	Value (\$mils)	Stock Price	3 month	12 month	Gross	EBITDA	Revenue	EBITDA	
HR/Staffing									
AMN Healthcare Services, Inc.	\$ 3,740	\$ 74.88	(12.1%)	(27.2%)	33.3%	14.2%	0.9x	6.4x	
ASGN Incorporated	\$ 5,495	\$ 96.17	17.7%	18.0%	29.1%	11.2%	1.2x	10.8x	
Cross Country Healthcare, Inc.	\$ 787	\$ 22.64	(8.7%)	(14.8%)	22.3%	8.0%	0.4x	4.4x	
Heidrick & Struggles International, Inc.	\$ 337	\$ 29.53	18.0%	5.6%	24.9%	12.3%	0.3x	2.7x	
Hudson Global, Inc.	\$ 23	\$ 15.49	(17.8%)	(31.6%)	10.9%	3.4%	0.1x	NM	
Insperty, Inc.	\$ 4,099	\$ 117.22	20.1%	3.2%	16.5%	4.6%	0.6x	13.9x	
Kelly Services, Inc.	\$ 710	\$ 21.62	18.9%	27.9%	20.1%	2.5%	0.1x	5.8x	
Kforce Inc.	\$ 1,316	\$ 67.56	13.2%	23.2%	28.2%	6.5%	0.8x	12.8x	
ManpowerGroup Inc.	\$ 4,689	\$ 79.47	8.4%	(4.5%)	17.9%	3.9%	0.2x	6.3x	
Robert Half Inc.	\$ 8,642	\$ 87.92	20.0%	19.1%	40.8%	10.7%	1.3x	12.1x	
TrueBlue, Inc.	\$ 495	\$ 15.34	4.6%	(21.7%)	26.7%	2.8%	0.3x	8.9x	
Upwork Inc.	\$ 1,838	\$ 14.87	30.9%	42.4%	75.1%	(4.5%)	2.8x	NM	
Mean	\$ 2,681	\$ 53.56	9.4%	3.3%	28.8%	6.3%	0.8x	8.4x	
Median	\$ 1,577	\$ 48.55	15.5%	4.4%	25.8%	5.6%	0.5x	7.7x	
Business Services Mean	\$ 12,037	\$ 82.79	12.8%	18.6%	29.0%	13.1%	1.6x	10.9x	
Business Services Median	\$ 5,755	\$ 61.60	13.9%	18.8%	24.1%	11.0%	1.1x	9.6x	

Source: S&P Capital IQ

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GCG Business Services Update | Q4 2023

Select M&A Transaction Activity

Announcement Date	Target Name	Buyer Name	Sector	Value (\$mm)	TEV/Rev	TEV/EBITDA
12/20/2023	The Tree Amigos Outdoor Services, LLC	Ruppert Landscape, LLC	Res. & Comm Field Services	-	-	-
12/19/2023	Reliable Construction Services, Inc.	JF Acquisition, LLC	Res. & Comm Field Services	-	-	-
12/14/2023	Heartland, LLC	PPC Investment Partners LP	Res. & Comm Field Services	-	-	-
12/14/2023	OCI Associates, LLC	Legence Holdings LLC	Infrastructure Services	-	-	-
12/13/2023	Westar Landscaping	Electric Sheep Robotics, Inc.	Res. & Comm Field Services	-	-	-
12/13/2023	Golden Hive, LLC	Job Mobz Inc	HR/Staffing	-	-	-
12/12/2023	TAY, Inc.	TAS Environmental Services, L.P.	Env. & Waste Services	-	-	-
12/12/2023	Hess-Rountree, Inc.	Bowman Consulting Group Ltd.	Infrastructure Services	-	-	-
12/12/2023	Total Electric, Inc.	ArchKey Solutions LLC	Infrastructure Services	-	-	-
12/11/2023	Heritage Environmental Services, LLC	EQT AB (publ); EQT Infrastructure VI	Env. & Waste Services	-	-	-
12/11/2023	The Mitchell Partnership Inc.	Bouthillette Parizeau Inc.	Infrastructure Services	-	-	-
12/8/2023	DCM Group Inc.	Desjardins Capital;	Res. & Comm Field Services	-	-	-
12/7/2023	Sutton Group Realty Services Ltd.	McCredie Investments	Real Estate Services	-	-	-
12/7/2023	Molisse Realty Group, LLC	William Raveis Real Estate & Home Services, Inc.	Real Estate Services	-	-	-
12/7/2023	Dansk Enterprises, Inc.	Allied Universal Security Services LLC	Facility Services	-	-	-
12/7/2023	Endeleo Facilitators, LLC	Technically Media Inc.	Res. & Comm Field Services	-	-	-

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GCG Business Services Update | Q4 2023

Select M&A Transaction Activity

Announcement Date	Target Name	Buyer Name	Sector	Value (\$mm)	TEV/Rev	TEV/EBITDA
12/6/2023	Executive Real Estate, Inc.	Corcoran Lifestyle Properties	Real Estate Services	-	-	-
12/5/2023	Stratus Building Solutions	Diversify Royalty Corp	Env. & Waste Services	-	-	-
12/1/2023	PumpMan, Inc.	Harrington Industrial Plastics LLC	Commercial Repair Services	-	-	-
11/27/2023	Bamboo Services, Inc.	Greenix Holdings LLC	Facility Services	-	-	-
11/15/2023	Savage Partners, LLC	Russell Reynolds Associates, Inc.	HR/Staffing	-	-	-
11/15/2023	Quality Environmental Services, LLC	Caymus Equity Partners LLC;	Env. & Waste Services	-	-	-
11/15/2023	Sonitrol Security Services, LLC	Pye-Barker Fire & Safety, LLC	Facility Services	-	-	-
11/15/2023	Sonitrol of the Midlands, Inc.	Pye-Barker Fire & Safety, LLC	Facility Services	-	-	-
11/15/2023	Septic Blue Inc.	Georgia Oak Partners, LLC	Env. & Waste Services	-	-	-
11/15/2023	Sydnic, LLC	SBJ Capital	Res. & Comm Field Services	-	-	-
11/14/2023	Shooter and Lindsey, Inc.	Juniper Landscaping, Inc.	Res. & Comm Field Services	-	-	-
11/9/2023	California State Fire Protection	Rapid Fire Safety & Security LLC	Facility Services	-	-	-
11/7/2023	Silversand Services, Inc.	Zodega Landscape Services, LLC	Res. & Comm Field Services	-	-	-
11/3/2023	Midwest Pest Management	Adam's Pest Control, Inc.	Res. & Comm Field Services	-	-	-
11/2/2023	Capital Waste Services, LLC	GFL Environmental Inc.	Env. & Waste Services	-	-	-
10/24/2023	Interstate Waste Services, Inc.	Ares Management Corporation	Env. & Waste Services	-	-	-

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GCG Business Services Update | Q4 2023

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Announcement Date	Target Name	Buyer Name	Sector	Value (\$mm)	TEV/Rev	TEV/EBITDA
10/19/2023	Resource Management, Inc.	Vensure HR, Inc.	HR/Staffing	-	-	-
10/19/2023	Solstys Environmental, LLC	Massey Services, Inc.	Env. & Waste Services	-	-	-
10/18/2023	Bicon, Inc.	Coastal Waste & Recycling, Inc.	Env. & Waste Services	-	-	-
10/18/2023	AP Civil Solutions, LLC	Aegion Corporation	Env. & Waste Services	-	-	-
10/16/2023	Sunset Garbage Collection Inc.	Recology Clackamas	Env. & Waste Services	-	-	-
10/12/2023	Golding Mechanical Services, Inc.	PremiStar, LLC	Facility Services	-	-	-
10/11/2023	Complete Landscape Care, Inc.	Electric Sheep Robotics, Inc.	Res. & Comm Field Services	-	-	-
10/10/2023	R.K. Electric, Inc.	Huron Capital Partners, LLC	Specialty Contract Work	-	-	-
10/7/2023	Pax Aero Solutions LLC	AIRtec Inc.	Infrastructure Services	-	-	-
10/6/2023	Emerald Turf Solutions LLC	Unlimited Landscaping & Turf Management, Inc.	Res. & Comm Field Services	-	-	-
10/5/2023	Chartwell Staffing Solutions	Partners Personnel - Management Services, LLC	HR/Staffing	-	-	-
10/5/2023	Comtron Systems, Inc.	Pye-Barker Fire & Safety, LLC	Facility Services	-	-	-
10/4/2023	Purge Rite, LLC	Milton Street Capital, LLC	Facility Services	-	-	-
10/4/2023	Ace of Blades, LLC	Emerald Lawns LLC	Res. & Comm Field Services	-	-	-
10/3/2023	Klima New Jersey, LLC	Hobbs & Associates, LLC	Facility Services	-	-	-
10/2/2023	Madison Environmental Resourcing, Inc.	Logistics Recycling, Inc.	Facility Services	-	-	-

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Business Services Expertise

GCG offers a unique breadth and depth of expertise in Business Services from both an operational and transactional standpoint. Our professionals bring direct experience in senior operating roles within the industry to augment our investment banking and consulting services.

Business Services is an evolving industry facing many opportunities and challenges. GCG's senior investment banking team leverages its deep industry knowledge and experience to provide strategic financial solutions for our clients in this rapidly changing environment. Our professionals are dedicated to understanding complex industry dynamics while providing merger and acquisition advisory services to companies and investors across several sectors in Business Services.

More about Greenwich Capital Group

Greenwich Capital Group LLC ("GCG") is a leading investment bank that advises clients including closely-held and family-owned businesses, private equity firms, and public companies. GCG's senior bankers have collectively advised on hundreds of transactions over many years of experience in mergers and acquisitions, with most having backgrounds with large U.S. and global firms. GCG is focused on advising clients in key industry verticals throughout the U.S.

GCG was founded by entrepreneurially minded investment banking professionals focused on building an organization centered around advising clients. We strive to build relationships by representing our clients' long-term interests and earning their trust. In contrast to the practice of pushing transaction responsibilities to junior resources, our philosophy is to deliver personalized, senior-level attention and experience to every GCG engagement. We are proud to offer references that will speak to a differentiated level of service and results. For additional perspective or to discuss M&A related opportunities in the Business Services sector, please reach out to GCG's Business Services practice leader, Joe Schmitt. For more information, please visit www.greenwichgp.com.

Data Sources: We have based our findings on data provided by industry recognized sources. Data and information for this publication was collated from the S&P Capital IQ database. For more information on this or anything else related to our research, please email info@greenwichgp.com.

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