



Jeffrey J. Aegerter

EXECUTIVE ADVISOR | INTERIM CEO & PRESIDENT | PE PORTFOLIO & OWNER-LED COMPANIES

I help owners, CEOs, boards, and investors solve the problems that stall a business — flat growth, eroding margins, weak financial visibility, and leadership teams that aren't executing.

I've founded and scaled companies, led complex P&Ls, and served as interim CEO and president — so I bring operator judgment, not just advice. I assess a business quickly, identify what's holding it back, and work alongside leadership to fix it, giving companies experienced executive capacity without adding a permanent C-suite role.

WHERE I HELP

Strategy & growth

Business strategy, revenue models, and market opportunity evaluation

Profitability & cash

P&L review, margin improvement, and operating performance

Financial discipline

Reporting, budgeting, forecasting, and internal controls

Accountability

KPI rhythm, management dashboards, and operating cadence

Leadership & organization

Team assessment and organizational design

Investor support

PE portfolio work, business model assessment, and decision support

SELECTED RESULTS

\$350M → \$1B

CONSUMER LENDING
PORTFOLIO

Pathward Financial · Division President, Consumer Lending

Scaled Pathward Financial's Consumer Lending Division (NASDAQ: CASH) while strengthening risk controls, expanding partner relationships, and launching new credit products.

~\$25M

SUSTAINABLE REVENUE
BASE

Barton Publishing · Interim President & CEO

Restored double-digit profitability by revitalizing the direct-response marketing business and rebuilding the C-suite.

~\$750M

ASSETS UNDER
MANAGEMENT

Capital Services, LLC · Founder & Owner-Operator

Built a portfolio management company serving 85+ financial institutions and more than 500,000 cardholders, with a team of 200+.

8 markets

FRANCHISE EXPANSION

Locals Love Us, LLC · Franchise CEO & Founding Franchise Owner

As CEO of the franchisor, executed the franchise expansion model on behalf of its private equity sponsor — shaping rollout strategy and growing the system to eight markets and roughly \$3M in annual revenue. Held a dual role throughout, owning one of the first franchises in the system, Locals Love Us – Quad Cities, LLC.

ENGAGEMENT FORMATS

Executive advisory

Ongoing decision support and strategic business review for owners, CEOs, boards, and investors.

Interim executive

CEO, president, CFO, or chief-of-staff roles through transition, turnaround, or growth.

Special projects

Acquisitions, turnarounds, new-initiative launches, and performance assessments.

Available for advisory, interim executive, and special-project engagements with owner-led, privately held, and investor-backed businesses.