

Press Release



May 30th, 2023

Boston, MA – Pension Technology Group (“PTG” or the “Company”), along with its founders and management team, announced a strategic and capital partnership with Case 5 Capital (“C5”). As part of this new partnership, C5 will recapitalize the Company, provide growth capital and invest in the PTG team to accelerate growth within the pension administration software industry.

PTG is extremely excited about the partnership with the C5 team. C5 will provide PTG with the financial resources and expertise that will be instrumental in the modernization of PTG’s technology solutions. This partnership will also allow PTG to invest further into research and development, sales and marketing, and an enhanced customer support experience through the utilization of online tools to compliment the “personal touch” on which PTG prides itself. PTG is confident this partnership will benefit our current and future customers and their membership community via the use of technology solutions and services that make up the core of PTG’s product offerings.

John Reidy, PTG’s Co-Founder, said, “The C5 team has a proven track record in assisting founder-run companies such as PTG to achieve their long-term goals. With C5’s guidance and support, I feel confident that PTG will be able to successfully navigate the ever-changing technology, security, and compliance landscape that pension funds are currently facing. PTG recognizes the need for pension administration software to have the highest level of security, user-friendly functionality and efficient workflows that allow funds to better serve the needs of their membership. PTG believes this partnership will further enhance its ability to meet these needs.

“I am excited to embark on our partnership with C5. It will enable us to better serve our public pension customers by not only improving and expanding our offerings, but our level of customer support as well.”, said Brian Bowler, PTG Co-Founder. “We value our relationships with our customers and are committed to providing the best possible customer experience across the board. C5 understands this which makes them the perfect partner to help us accomplish that goal.”

Brandon Johnson, Managing Director at C5, added “John, Brian and the rest of the PTG team have built a solid foundation of meeting the needs of their customers and delivering a high level of customer support. Most importantly, PTG has earned the trust of more than 150 customers across 14 states and we believe that with further investment in product, sales & marketing and customer support, we will deepen the trust with existing customers while bringing our value-added solutions to many new pension funds across the United States.”

About Pension Technology Group

Pension Technology Group, founded in 2006, is a leading provider of web-based pension administration software solutions to public employee pension funds. PTG has more than 150 customers in 14 states, and is headquartered in Boston Massachusetts, PTG prides itself on the deep roots that its employees have within the public employee pension community.

About Case 5 Capital

Case 5 Capital, a family office located in Southlake, TX, manages the capital of multiple high net worth families in the Dallas-Fort Worth, TX metro area. C5 seeks to invest in and grow founder-led businesses in the software, government technology, business services, industrial services, healthcare services, healthcare technology and consumer industries. C5 views its investments as long-term partnerships and supports these partnerships with strategic advice, talent and capital.