Uplift Investors Announces Acquisition of Technology Consultancy Engage fi

Darien, CT (August 18, 2026) – Uplift Investors ("Uplift"), a middle-market private equity firm with a business model-centric focus on services investing, today announced the acquisition of Engage fi, a leading technology and strategic advisory firm serving banks and credit unions from Falfurrias Management Partners. Terms of the transaction were not disclosed.

Engage fi partners with financial institutions to evaluate, select, negotiate and implement technology solutions across payments, digital banking, core banking, integrated communications and other areas. The company also provides conversion services and strategic advisory solutions designed to help banks and credit unions improve operational efficiency, navigate technology transformation, and position their organizations for long-term growth.

The transaction marks Uplift's third platform investment in its inaugural fund and, following the creation of Orion Legal MSO earlier this year, the second investment that organizes in a professional services business model. Uplift will leverage its 5-5-5 Framework and value creation initiatives tailored to professional services to support value creation.

"Engage fi operates at the center of some of the most important technology and strategic decisions facing banks and credit unions today," said Brad Skaf, Managing Partner at Uplift. "The company's deep expertise, trusted client relationships, and ability to deliver measurable value across the technology lifecycle have created a differentiated platform in attractive end markets. We are excited to partner with their team to build on that strong foundation and support the company's next phase of growth."

"Modernization, changing customer expectations, and the rapid proliferation of AI are making it very difficult for companies to stay in control of their technology stack. Engage fi offers exceptional solutions to these growing challenges," said Will Hausberg, Managing Partner at Uplift. "Through Uplift's Go-to-Market Excellence Value Creation Center (VCC), we will bring proven solutions in front of more institutions and expand what Engage fi does for the clients it has. Through our Technology, Data and AI VCC, we will invest behind a decade of proprietary data and the AI tools that sharpen how the work gets delivered."

"Our team has built Engage fi around a simple principle: our success is measured by the success of our clients. As we considered the right partner for our next chapter, Uplift stood out for its deep understanding of our business, thoughtful approach to partnership and value creation, and shared commitment to investing in our people and capabilities," said Andres Pasantes, President and Chief Executive Officer of Engage fi. "We look forward to working together to build on the platform we have created, broaden the ways we support our clients, and plan to continue delivering the expertise and results financial institutions rely on us for."

William Blair & Company and KeyBanc Capital Markets served as financial advisors to Uplift, and Kirkland & Ellis acted as its legal counsel. Guggenheim Securities served as the financial advisor to Engage fi, and K&L Gates acted as its legal counsel.

About Uplift Investors

Uplift Investors is a middle-market private equity firm purpose-built to invest in services businesses. Its proprietary 5-5-5 Framework maps five scalable business models against five durable services sectors, with five functionally aligned Value Creation Centers (VCCs) applied to every investment. The VCCs cover organizational design, technology, data and AI, go-to-market, talent, and M&A, each led by an experienced C-suite operator. The firm closed its debut fund at its $670 million hard cap in July 2026 and is headquartered in Darien, Connecticut. For more information, visit www.upliftinvestors.com.

About Engage fi

Engage fi is a technology-enabled consulting and advisory firm helping banks and credit unions make smarter, faster technology and vendor decisions. Backed by more than 2,700 successful engagements, the firm delivers strategic advisory, technology evaluations, contract negotiations, and vendor benchmarking, along with end-to-end support across core, digital, payments, CRM, AI, integrated communications, and merger and acquisition initiatives.

Engage fi also provides fully managed conversion, migration, merger, and implementation services, powered by proprietary platforms including 360fi Workflow and DataFusion. By combining deep industry expertise, automation, and proven execution, Engage fi helps financial institutions modernize operations, reduce risk, and achieve measurable business outcomes.

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