

Financial Services Deals for April 2019

Company Name	Description	Deal Synopsis
CleanCapital	Provider of a financial investment platform designed to assist clients with investment in renewable energy projects. The company's platform identifies, screens and manages clean energy projects helping institutional investors, family offices and funds to invest in secure and diversified clean energy projects and simultaneously provide sponsors a way to exit clean energy assets, enabling investors to invest directly in managed energy projects.	The company received an undisclosed amount of development capital from BlackRock on April 2, 2019. The investment provides for the continued growth of the company as it expands into new markets and new renewable energy asset classes, with a specific focus on distributed solar and energy storage.
Corey Steinbach Insurance Agency	Provider of insurance products for the agricultural industries. The company offers specialized crop insurance products.	The company was acquired by Hub International (United States), via its financial sponsors Hellman & Friedman, Alpinvest Partners, HarbourVest Partners and Altas Partners, through an LBO on April 5, 2019 for an undisclosed sum.
Franco Signor	Provider of Medicare payer solutions. The company offers comprehensive Medicare secondary payer (MSP) compliance solutions to the largest employers, insurers, and third-party administrators enabling them to mitigate exposures for primary plans and offers services like insurer reporting, conditional payment resolution, Medicare set-aside allocations, and post-settlement administration.	The company received an undisclosed amount of development capital from BV Investment Partners on April 25, 2019.
Green Harvest Asset Management	Provider of tax-beneficial investment products and services. The company specializes in creating and managing ETF portfolios seeking to track U.S., global and custom indices while maximizing after-tax returns using capital loss harvesting strategies to create and deliver the strategy that is best suited for clients' needs.	The company received an undisclosed amount of development capital from Resolute Investment Managers on April 30, 2019.
Relation	Provider of property and casualty insurance services. The company offers products and advisory to property and casualty risk management and benefit consulting firms. The services are usually used in real estate, non profit and hospitality services.	The company was acquired by Aquiline Capital Partners through an LBO on April 15, 2019 for an undisclosed sum. As a result of the transaction Parthenon Capital Partners and Century Equity Partners will sell their stake in the company.

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Scharf Investments	Operator of an investment advisory firm intended to provide high-quality value investment strategies to individuals, family offices, corporations, endowments and foundations. The firm maintains a strict focus on valuation, margin of safety, investment flexibility and long-term perspective while making investment decisions and uses its proprietary Multi-factor Analytical Performance (MAP) screen to help clients achieve their financial goals.	The company received an undisclosed amount of development capital from iM Global Partner on April 22, 2019. The investment will help iM Global Partner to strengthen its offering with a wider range of high alpha products.
Siris Capital	Operator of a private equity firm. The company focuses on making investments in data, telecommunication, technology and technology-enabled business service companies primarily located in North America.	Landmark Partners and Wafra Investment Advisory Group acquired a minority GP stake in the company on April 3, 2019 for an undisclosed sum.