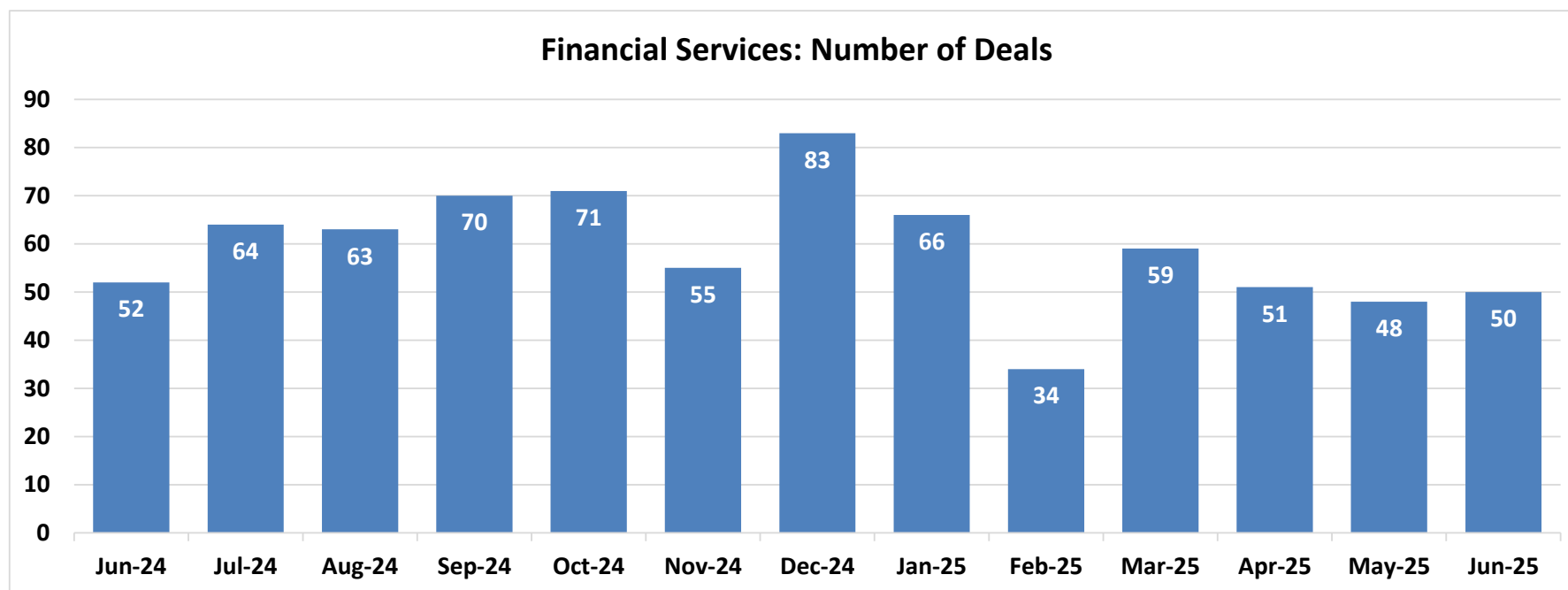


Financial Services Deals for June 2025

There were 50 completed U.S. private equity deals in the Financial Services sector during the month of June. The number of deal transactions were up approximately 4% from May.

- 4% decline in the number of Financial Services deals compared to June 2024
- 26 deals closed within the Other Financial Services Industry Group, leading the sector



Financial Services Deals for June 2025

Company Name	Description	Deal Synopsis
AIT Consulting	Provider of consultation, optimization, and ongoing management services intended to serve OneStream Software users. The company offers finance and accounting expertise, acquisition integration management, business intelligence, governance, risk, and compliance-related consulting services, thereby designing and implementing controls for its clients.	The company was acquired by WilliamsMarston, via its financial sponsor Kelso & Company, through an LBO on June 24, 2025 for an undisclosed amount.
Albert G. Ruben	Operator of a retail entertainment insurance brokerage company intended for the Hollywood and global entertainment industry. The company specializes in entertainment risk management, loss control services and claims advocacy.	The company, a subsidiary of Aon, was acquired by Relation Insurance, via its financial sponsors Celerity Partners and Aquiline, through an LBO on June 26, 2025 for an undisclosed amount.
Alkeme Insurance	Provider of insurance brokerage services intended to offer business security. The company specializes in offering insurance including property and casualty, benefits, personal, enterprise risk management, surety and bonding to a large variety of commercial accounts and businesses, enabling clients to get reliable protection for the future.	The company was rolled into a continuation fund by GCP Capital Partners through an undisclosed amount on June 12, 2025. The funds will be used to pursue strategic acquisitions, invest in cutting-edge technology, and further enhance its client offerings.

Financial Services Deals for June 2025

Company Name	Description	Deal Synopsis
Americollect	Operator of a medical debt collection agency intended to offer early out and bad debt collection services to healthcare providers. The company offers patient engagement services through its collectors, who are trained to understand the complexities of medical accounts and prioritize treating patients with respect, ensuring a smooth collection process while adhering to health regulations.	The company was acquired by GetixHealth, via its financial sponsors Cordish Dixon Private Equity Fund I and H.I.G. Capital, through an LBO on June 18, 2025, for an undisclosed amount.
AMP Wealth Management	Provider of wealth management and financial planning services catering to medical, dental, and other high-income professionals. The company specializes in investment portfolio design, retirement planning, and income strategies, helping professionals build long-term wealth, manage risk, and achieve financial independence.	The company was acquired by Merit Financial Group, via its financial sponsors Wealth Partners Capital Group, HGGC, and NB Capital Solutions through an LBO on June 24, 2025 for an undisclosed amount.
B. Riley Advisory Services	Operator of a financial advisory services firm intended to solve complex business problems. The company's services include transaction advisory, due diligence, fraud investigations, corporate litigation, business valuations, crisis management and bankruptcy, enabling clients to protect, enhance and create value for their work.	The company, a subsidiary of B. Riley Financial was acquired by TorQuest Partners through an LBO on June 27, 2025 for an undisclosed amount.
Blue Horizon Benefits	Operator of a digital employee benefits management platform intended to streamline health, dental, vision, and ancillary coverage enrollment. The company's platform integrates real-time eligibility tracking, automated carrier feeds, and user-friendly decision tools, enabling small and mid-sized businesses to simplify benefits administration and enhance employee satisfaction.	The company was acquired by Alkeme Insurance, via its financial sponsors GCP Capital Partners and Solamere Capital, through an LBO on June 25, 2025 for an undisclosed amount.

Financial Services Deals for June 2025

Company Name	Description	Deal Synopsis
Blue Valley Insurance	Operator of an insurance agency intended to offer personal, commercial, and health insurance services to clients. The company offers products like life insurance, automobile insurance, home insurance, flood insurance and other related products, enabling clients to have a one-stop shop for all of their insurance needs.	The company was acquired by Alkeme Insurance, via its financial sponsors Solamere Capital and GCP Capital Partners, through an LBO on June 13, 2025 for an undisclosed amount.
BryanMark Group	Provider of insurance services intended for affluent clients. The company specializes in large and complex life insurance placements and focuses on providing customized life insurance services for wealth accumulation, estate, and retirement benefit planning goals, thereby helping clients by providing customized services as per their needs.	The company was acquired by Winged Keel Group, via its financial sponsor GTCR, through an LBO on June 9, 2025 for an undisclosed amount.
Buffington Mohr McNeal	Provider of investment advisory and wealth management services intended to serve clients in person and virtually. The company provides fiduciary financial advisory services and manages clients' assets, thereby addressing customers' financial needs.	The company was acquired by EP Wealth Advisors, via its financial sponsor Berkshire Partners, through an LBO on June 4, 2025 for an undisclosed amount.
Buie Insurance Services	Provider of insurance and employee benefit services intended to offer coverage with personalized service for individuals and businesses. The company offers insurance carriers and a team of experienced professionals, thereby providing clients with simplified access to competitive coverage for their businesses, employees, and families.	The company was acquired by Alkeme Insurance, via its financial sponsor Solamere Capital and GCP Capital Partners, through an LBO on June 13, 2025 for an undisclosed amount.
Buie Insurance Services	Provider of insurance and employee benefit services intended to offer coverage with personalized service for individuals and businesses. The company offers insurance carriers and a team of experienced professionals, thereby providing clients with simplified access to competitive coverage for their businesses, employees, and families.	The company was acquired by Tesani Companies through an LBO on June 1, 2025 for an undisclosed amount.

Financial Services Deals for June 2025

Company Name	Description	Deal Synopsis
Cameron Group	Provider of insurance brokerage services intended for individual and commercial customers. The company offers specialty business insurance programs for contractors, restaurants, and auto repair garages, enabling clients to reduce risk and meet their insurance needs.	The company was acquired by King Insurance Partners, via its financial sponsors BHMS Investments and Lightyear Capital, through an LBO on June 10, 2025 for an undisclosed amount. This acquisition underscores King Risk Partners' commitment to expanding its service to local communities throughout the broader Eastern and Southeastern regions of the United States while maintaining its commitment to excellence.
ClearCourse Consulting	Provider of consultancy services intended to serve mid and large-sized employers. The company offers services such as process transformation, payroll, workforce management, operational assessment, human capital consulting and benefit services, thereby helping its customers to maximize the rate of return on their human capital management.	The company was acquired by HR Path, via its financial sponsors Re-Sources Capital and Societe Generale Capital Partenaires, through an LBO on June 24, 2025 for an undisclosed amount.
Custom Benefit Plans	Provider of benefits-focused insurance services intended to help individuals and businesses manage and mitigate financial risk through tailored coverage. The company offers personalized advisory services, broad access to healthcare and senior insurance products, and deep industry expertise, enabling insurance brokers and individual clients to secure comprehensive and adaptable protection that aligns with their evolving needs.	The company was acquired by OneDigital, via its financial sponsor New Mountain Capital and Onex, through an LBO on June 24, 2025 for an undisclosed amount.
CW Advisors	Provider of wealth management services intended to serve high-net-worth and ultra-high-net-worth individuals, families, foundations, and endowments. The company offers comprehensive financial planning, investment consulting, and family office services tailored to the needs of clients, enabling long-term asset protection and growth through personalized strategies and objective guidance.	The company was acquired by Osaic, via its financial sponsors Reverence Capital Partners through a \$13.5 million LBO on June 17, 2025. The acquisition is part of Osaic's broader strategy to diversify advisor affiliation models while scaling access to family office-level resources via firms like Premier Trust and Highland Capital Brokerage.

Financial Services Deals for June 2025

Company Name	Description	Deal Synopsis
Denver West Insurance Brokers	Provider of insurance brokerage services intended to serve individuals and businesses. The company offers commercial and personal insurance products, including commercial auto, general liability, property, business owner policies, flood coverage for businesses, homeowners, renters, recreational vehicles, and watercraft insurance, enabling clients to access tailored coverage that addresses diverse personal and professional risk management needs.	The company was acquired by Inszone Insurance Services, via its financial sponsors BHMS Investments, Ares Management and Lightyear Capital, through an LBO on June 12, 2025 for an undisclosed amount.
Desert Sky Advisors	Provider of wealth advisory services intended to support high-net-worth individuals in achieving financial goals. The company offers investment planning, tax management, estate strategies, and retirement solutions, enabling clients to implement customized and comprehensive financial plans.	The company was acquired by Steward Partners Global Advisory, via its financial sponsors Cynosure Partners, and The Pritzker Organization, through an LBO on June 2, 2025 for an undisclosed amount.
Eagle Harbor Insurance	Provider of insurance broker services intended to protect individuals and businesses against unexpected life risks. The company offers a diverse selection of coverage options, including home, auto, umbrella, health, life, business, and travel insurance, along with annual policy reviews and claims advocacy, enabling residents and enterprises in Kitsap County to secure tailored protection and peace of mind.	The company was acquired by Inszone Insurance Services, via its financial sponsors BHMS Investments, Ares Management and Lightyear Capital, through an LBO on June 25, 2025 for an undisclosed amount.
ePlus (Financing Business)	Provider of financing services intended to help government agencies, healthcare providers, and businesses align technology acquisition costs with budget cycles while accelerating value realization. The company offers customized financing programs, leasing options, and payment options that incorporate labor, training, software, hardware, and maintenance, providing government entities, healthcare organizations, and businesses with the flexibility to manage capital outlays and maintain delivery of advanced services.	The financing business division of ePlus, was acquired by PEAC Solutions, via its financial sponsor HPS Investment Partners, through an LBO on June 30, 2025 for an undisclosed amount.

Financial Services Deals for June 2025

Company Name	Description	Deal Synopsis
Evers Insurance Services	Provider of commercial and personal insurance services catering to the garage and auto dealer industries. The company specializes in business, automobile, and home insurance coverage, thereby delivering personalized, high-quality insurance solutions to businesses.	The company was acquired by Inszone Insurance Services, via its financial sponsors BHMS Investments, Ares Management and Lightyear Capital, through an LBO on June 17, 2025 for an undisclosed amount.
Excel Bank	Provider of banking service catering to individuals and businesses across California. The company offers personalized service, expert guidance across a range of sophisticated financial products, and direct access to decision-makers, enabling customers to achieve their financial goals with confidence and ease.	The company was acquired by Genesis Bank, via its financial sponsor Arkview Capital, through an LBO on June 13, 2025 for an undisclosed amount.
Fenner & Esler Agency	Provider of professional liability insurance brokerage services intended to provide tailored coverage for design professionals. The company offers access to multiple A-rated carriers, personalized policy structures, and value-added services like risk management webinars and legal contract reviews, enabling architects, engineers, surveyors, and environmental consultants to secure comprehensive protection at competitive rates.	The company was acquired by Hub International, via its financial sponsors Blackstone, Leonard Green & Partners, Hellman & Friedman, Finback Investment Partners, Alpha Wave Global, Altas Partners through an LBO on June 3, 2025 for an undisclosed amount.
Full Sail Capital	Provider of fiduciary financial advisory services intended for individuals seeking transparent, client-first investment guidance. The company offers full disclosure, conflict-free advice, and personalized service, enabling investors to make confident, informed financial decisions.	The company was acquired by Mercer Advisors, via its financial sponsors Altas Partners, Genstar Capital, Harvest Partners, NB Capital Solutions, and Oak Hill Capital, through an LBO on June 2, 2025 for an undisclosed amount.

Financial Services Deals for June 2025

Company Name	Description	Deal Synopsis
Hatcher Insurance	Provider of insurance brokerage services intended to navigate the complexities of insurance and bonding for a broad spectrum of client segments and industries. The company offers property and casualty, surety bonding, employee benefits, life and personal insurance products, providing clients with assistance for any risk management needs.	The company was acquired by Unison Risk Advisors, via its financial sponsor Peloton Capital Management, through an LBO on June 9, 2025 for an undisclosed amount. Through this acquisition, Unison Risk Advisors intends to enhance its ability to serve existing clients, while expanding reach across Northern and Central Florida.
Heritage Financial Planning (Dallas)	Provider of fee-only, fiduciary financial planning and investment advisory services intended to deliver objective, comprehensive wealth management, retirement, college funding, and insurance planning for individuals and families. The company's financial planning services include personalized investment strategy, retirement income mapping, college funding guidance, lump-sum distributions, insurance analysis, and charitable legacy planning, providing clients with	The company was acquired by Beacon Pointe Advisors, via its financial sponsor Kohlberg Kravis Roberts, through an LBO on June 30, 2025 for an undisclosed amount.
Huffmaster Insurance Agency	Provider of insurance services intended to serve the personal and commercial sectors. The company offers auto, home, business, life, health, and recreation insurance, thereby enabling clients to receive comprehensive coverage and personalized customer service.	The company was acquired by Inszone Insurance Services, via its financial sponsors Ares Capital, Lightyear Capital and BHMS Investments, through an LBO on June 26, 2025 for an undisclosed amount.
Huggins Actuarial Services	Provider of actuarial and risk management consulting services for insurers, healthcare companies, law firms, brokers, and auditing firms. The company's services include loss reserving, economic capital modeling, predictive analytics, and captive feasibility studies, providing valuable assistance in the day-to-day operations of the client's firm.	The company was acquired by Lewis & Ellis, via its financial sponsor Novacap, through an LBO on June 11, 2025 for an undisclosed amount. The acquisition expands Lewis & Ellis's actuarial capabilities within the property and casualty (P&C) insurance market.
Independence Wealth Advisor	Provider of wealth management services intended to serve enterprises and individuals. The company offers a wide range of services, such as retirement planning, financial planning, and investment management consultation services, enabling clients to plan for their future with financial backup.	The company was acquired by Apella Wealth, via its financial sponsor HGGC, through an LBO on June 30, 2025 for an undisclosed amount.

Financial Services Deals for June 2025

Company Name	Description	Deal Synopsis
Integrated Brokerage Services	<p>Provider of insurance and risk management services intended to serve individuals, small-to-medium businesses, large corporations, and niche industries.</p> <p>The company offers a broad range of coverages, including automobile, business and commercial, property, workers' compensation, as well as dedicated support in underwriting and claims, enabling businesses to manage risk with precision and long-term stability.</p>	The company was acquired by Alkeme Insurance, via its financial sponsors Solamere Capital and GCP Capital Partners, through an LBO on June 23, 2025 for an undisclosed amount.
Iron Horse Wealth Management	<p>Operator of a registered investment adviser (RIA) intended for families, professionals, retirees, and business owners. The company offers fee-only advisory services such as financial and retirement planning, college planning, and investment management, thereby helping its clients achieve their goals and reach their financial destination reliably.</p>	The company was acquired by Apella Wealth, via its financial sponsor HGGC, through an LBO on June 20, 2025 for an undisclosed amount. The acquisition establishes Apella Wealth's presence in Johnston, and extends the company's financial planning and investment management services into the Midwest region.
Leasepath	<p>Developer of a global lease and loan management platform intended to serve the asset finance and leasing industry. The company offers customer engagement and origination tools, as well as contract servicing capabilities, enabling users to manage bookings, interim rent, accounting, invoicing, asset tracking, collections, insurance, securitization, and portfolio management with efficiency and accuracy.</p>	The company was acquired by Solifi, via its financial sponsors Thoma Bravo and TA Associates Management, through an LBO on June 30, 2025 for an undisclosed amount. The acquisition will complement Solifi's product portfolio by adding a solution aimed at the small-to-mid-market secured finance segment.
Miami International	<p>Operator of a fully electronic trading platform intended to cater to the needs of the customer and trading community. The company's in-house trading platform focuses on developing, operating, and trading on exchanges to provide participants with the right to invest in exchange for the prepayment of certain transaction fees and the achievement of certain liquidity volume thresholds.</p>	The company received \$40 million of development capital from Warburg Pincus on June 24, 2025. The financing is intended to be used for the acquisition of The International Stock Exchange (TISE), a leading market in Europe for listing high yield bonds, structured finance products and securitization transactions. The investment also provides significant support for the company's global expansion as it executes on its strategy of building a diversified revenue stream across multiple geographies.

Financial Services Deals for June 2025

Company Name	Description	Deal Synopsis
NextFed	Provider of strategy consulting and mergers and acquisitions advisory services intended for clear analysis and actionable strategic support. The company offers actionable expertise based on full spectrum market, customer, and growth analysis and provides clarity through rapid due diligence covering financial, market, growth, and strategy like screening and target identification, sell-side and buy-side support, allowing private equity firms, defense, intelligence, federal civil companies and commercial aerospace industry for strategic	The company was acquired by Aprio, via its financial sponsor Charlesbank Capital Partners, through an LBO on June 4, 2025 for an undisclosed amount. The acquisition represents a strategic geographic expansion for Aprio, establishing a second location in the Washington, D.C. metro area with the addition of the company's Arlington office, alongside its existing presence in Rockville, Maryland.
Nobles Insurance Agency	Operator of an independent insurance agency intended to serve individuals and businesses. The company offers services including auto insurance, home insurance, business insurance, life insurance, and recreational insurance, thereby leveraging its extensive network of carriers to find the best policies suited to clients' specific requirements.	The company was acquired by King Insurance Partners, via its financial sponsors BHMS Investments and Lightyear Capital, through an LBO on June 17, 2025 for an undisclosed amount.
NOW CFO	Operator of a financial consulting firm intended to offer financial reporting and management. The company offers a range of services, including CFO strategy, controller analysis, staff accountant execution, internal controls, bookkeeping and payroll services, annual operating plans, and financial strategy.	The company was acquired by CenterOak Partners through an LBO on June 30, 2025 for an undisclosed amount. As a result of the transaction, the company was recapitalized.
Olympic Wealth Management	Provider of investment and retirement planning services intended to support aerospace professionals, particularly Boeing employees and retirees, in achieving long-term financial security. The company offers personalized investment and retirement strategies tailored to the needs of clients in the Seattle-Tacoma aerospace sector, specializing in advising Boeing employees and retirees, enabling them to plan for and navigate their financial future confidently.	The company was acquired by Merit Financial Group, via its financial sponsor HGGC, NB Capital Solutions and Wealth Partners Capital Group, through an LBO on June 13, 2025 for an undisclosed amount.

Financial Services Deals for June 2025

Company Name	Description	Deal Synopsis
Orion First	Provider of commercial debt recovery and business process outsourcing services based in Gig Harbor, Washington. The company offers first-party and third-party collections, legal collections, accounts receivable management, customer service outsourcing, and skip tracing, leveraging advanced technology and a highly trained workforce to efficiently manage and recover outstanding debts while maintaining positive customer relationships and ensuring compliance with	The company was acquired by Concord Servicing, via its financial sponsors Balance Point Capital and GTCR, through an LBO on June 16, 2025 for an undisclosed amount.
PowerTransitions	Provider of energy redevelopment services focused on transitioning retired or near-retiring thermal generation and industrial assets in the United States. The company specializes in acquiring environmentally challenged sites, managing remediation, and implementing zero-carbon energy, thereby facilitating the decarbonization of the electrical grid.	The company was acquired by Partners Group through an estimated \$450 million LBO on June 4, 2025.
Quest Analytics (Pittsburgh)	Developer of financial services technology and training platform intended to help banks and credit unions grow quickly and profitably. The company offers comprehensive tools for measuring, managing, and monitoring provider network adequacy, data accuracy, and performance across various lines of business, integrating features like network compliance	The company was acquired by UFS, via its financial sponsor BV Investment Partners, through an LBO on June 11, 2025 for an undisclosed amount.
Redwood Services	Operator of a platform focused on partnering and investing in leading family entertainment centers. The company provides the expertise of leaders who have spent their careers in the home service industry and the financial backing necessary to grow, thereby enhancing the homeowner experience.	The company was acquired by Altas Partners through a \$1.1 billion LBO on June 16, 2025.

Financial Services Deals for June 2025

Company Name	Description	Deal Synopsis
Roehr Insurance Agency	Provider of insurance brokerage services intended to serve businesses, individuals, and private clients. The company offers risk management services, property insurance, commercial general liability coverage, business auto insurance, and cybersecurity protection, enabling clients to manage risks effectively while safeguarding their commercial and personal interests.	The company was acquired by Higginbotham, via its financial sponsors Blackstone, Stone Point Capital and The Carlyle Group, through an LBO on June 2, 2025 for an undisclosed amount.
Schroeder Insurance	Provider of insurance products intended for personal and commercial purposes. The company offers a wide range of insurance products such as auto, boating, classic car, health, life and other personal insurance and commercial insurance such as auto dealers, contractors insurance, liquor liability, restaurant insurance and other commercial-related insurance, thereby helping clients reduce liability.	The company was acquired by Risk Strategies Company, via its financial sponsors HarbourVest Partners and Kelso & Company, through an LBO on June 3, 2025 for an undisclosed amount.
Scott Held Insurance Agency	Operator of an insurance agency catering to the needs of homeowners, drivers, and small to medium-sized enterprises (SMEs). The company offers auto insurance, home insurance, business owners' packages (BOP), and commercial real estate insurance, thereby providing insurance services that protect individuals and businesses.	The company was acquired by Hub International, via its financial sponsors Alpha Wave Global, Blackstone, Leonard Green & Partners, Temasek Holdings, T. Rowe Price Group, Hellman & Friedman, Finback Investment Partners and Altas Partners through an LBO on June 4, 2025 for an undisclosed amount.
SOLIC Capital Advisors	Provider of financial advisory services intended to serve across North America. The company offers restructuring, investment banking, and distressed asset support services, thereby enabling clients to receive effective solutions.	The company was acquired by Audax Private Equity, via its financial sponsors Stone Point Capital and Gordon Brothers, through an LBO on June 26, 2025 for an undisclosed amount.

Financial Services Deals for June 2025

Company Name	Description	Deal Synopsis
Texas Service Life Insurance Company	Provider of funeral insurance services based in Austin, Texas. The company provides a variety of insurance products, including preneed funeral insurance and whole life insurance, along with child riders and accidental death riders.	The company was acquired by Federal Life Group, via its financial sponsor Bain Capital, through an LBO on June 4, 2025 for an undisclosed amount. This strategic move underscores Federal Life's commitment to expanding growth pathways and forward-thinking solutions that empower families to plan with confidence.
Vendrix	Developer of spend management software designed for construction companies. The company's software allows users to view and control their company's transactions, cost allocation, and employee spending management and it also offers cards that are easy to manage to its users, enabling users to control budgets, track spending, and manage finances from a single interface.	The company was acquired by Foundation Software, via its financial sponsors Thoma Bravo and Goldman Sachs Asset Management, through an LBO on June 11, 2025 for an undisclosed amount.
Veripax Wealth Management	Provider of financial planning and investment advisory services intended to serve high-net-worth individuals and small businesses in California. The company specializes in discretionary portfolio management and retirement income planning, thereby delivering personalized strategies to help clients achieve their financial goals.	The company was acquired by Hub International, via its financial sponsors Blackstone, Leonard Green & Partners, Hellman & Friedman, Finback Investment Partners and Altas Partners, through an LBO on June 9, 2025 for an undisclosed amount.
Waypoint Wealth Partners	Provider of comprehensive financial planning and investment management services intended to guide individuals and families through critical wealth decisions and help translate life goals into actionable financial plans. The company specializes in fee-only financial planning, disciplined investment management, ongoing coaching, tax and retirement planning, and charitable giving, providing clients with personalized, values-aligned strategies that enable them to achieve clarity.	The company was acquired by Beacon Pointe Advisors, via its financial sponsor Kohlberg Kravis Roberts, through an LBO on June 30, 2025 for an undisclosed amount.
Wycoff Insurance Agency	Provider of comprehensive insurance services, including auto, home, business, farm, life, and specialty vehicle coverage, intended for personalized protection tailored to individual and business needs. The company offers a wide range of insurance services, including auto, home, business, farm, life, and specialty vehicle coverage, thereby enabling tailored coverage that meets diverse needs.	The company was acquired by Hub International, via its financial sponsors Blackstone, Alpha Wave Global, Leonard Green & Partners, Temasek Holdings, T. Rowe Price Group, Hellman & Friedman, Finback Investment Partners, and Altas Partners, through an LBO on Jun 5, 2025 for an undisclosed amount.