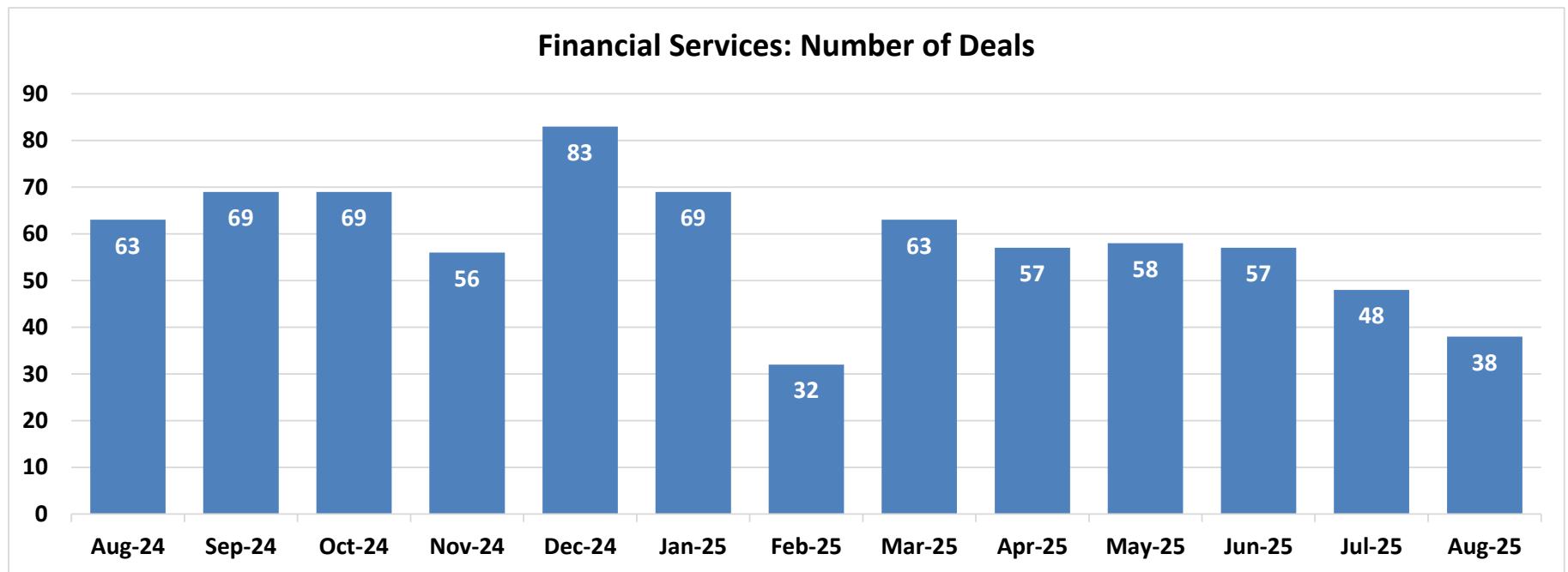


# Financial Services Deals for August 2025

There were 38 completed U.S. private equity deals in the Financial Services sector during the month of August. The number of deal transactions were down approximately 21% from July.

- 40% decline in the number of Financial Services deals compared to August 2024
- 19 deals closed within the Other Financial Services Industry Group, leading the sector



## Financial Services Deals for August 2025

Company Name	Description	Deal Synopsis
AcreTrader	Developer of an online investment platform intended to provide access, liquidity, and transparency in the asset class of land. The company's platform facilitates both large transactions and fractional ones as well as farmland investments, providing investors with direct access to an attractive asset class.	The company was acquired by Proterra Investment Partners through an LBO on August 12, 2025 for an undisclosed amount.
Aptus Wealth Management	Provider of financial planning and investment management services intended to serve individuals and families. The company offers retirement planning, investment management, tax-efficient strategies and financial advisory services, providing clients with personalized service to address their specific financial situation and goals.	The company was acquired by Simplicity Financial Marketing Holdings, via its financial sponsors SkyKnight Capital and Dragoneer Investment Group, through an LBO on August 21, 2025 for an undisclosed amount.
Axios Advisory Group	Provider of wealth management services intended for individuals and corporations. The company offers personal wealth management, corporate consulting, insurance strategies, investment management, and a personal financial portal, ensuring to help replace confusion with clarity and reactionary decisions with proactive strategies.	The company was acquired by EdgeCo Holdings, via its financial sponsors Parthenon Capital Partners and Waterfall Asset Management, through an LBO on August 4, 2025 for an undisclosed amount. The transaction reflects a continued commitment by EdgeCo Holdings and its subsidiaries to provide retirement solutions to the small- and mid-sized retirement plan market and the advisors and intermediaries that serve them.
Better Money Decisions	Provider of a fee-only investment advisory firm intended for women navigating life transitions, including divorce and retirement. The firm's services include financial wellness, investment management, tax planning, insurance review, estate planning, and economic problem solving, operating as a fiduciary, and emphasizing integrity, compassion, and collaboration.	The company was acquired by EP Wealth Advisors, via its financial sponsor Berkshire Partners, through an LBO on August 26, 2025 for an undisclosed amount. The acquisition expands EP Wealth Advisors' footprint in the Southwest.

## Financial Services Deals for August 2025

Company Name	Description	Deal Synopsis
Bowman Financial Solutions	Provider of counseling practice and financial consulting intended to offer real estate, retirement, investment, tax, and insurance planning services for couples and families. The company offers financial consulting services to all age groups, serving communities across North Carolina, including Wake Forest, Raleigh, Cary, Rolesville, and Wilmington.	The company was acquired by Osaic, via its financial sponsor ACE & Company and Reverence Capital Partners, through an LBO on August 5, 2025 for an undisclosed amount.
Bridlewood Insurance Services	Provider of medical insurance services and guidance intended to focus and driven to help seniors with their Medicare insurance needs. The company offers a broad range of insurance plans that includes advantage plans, prescription drug plans, as well as supplemental plans and in-home care guidance, enabling its clients to leverage their supplemental plans.	The company was acquired by Relation Insurance, via its financial sponsors Aquiline and Celerity Partners, through an estimated \$150 million LBO on August 1, 2025.
Capital Strategies Investment Group	Provider of financial services to individuals, families and organizations. The company specializes in investment advisory, investment research, customized investment management, retirement planning and wealth management.	The company was acquired by SageView Advisory Group, via its financial sponsor Aquiline, through an LBO on August 14, 2025
D & S Life Agency	Provider of employee benefit advisory services for managing health insurance costs and employee health initiatives. The company offers benefit plans, including level-funded and self-funded health insurance options, cost and disease management strategies, ACA compliance service, and streamlined enrollment processes, serving employers across various industries.	The company was acquired by Alkeme Insurance, via its financial sponsors Apollo Asset Management, GCP Capital Partners and Solamere Capital, through an LBO on August 27, 2025 for an undisclosed amount.
DeFalco & Co, CPA	Provider of accounting, tax, and financial advisory services intended to serve individuals and closely held businesses. The company offers a full suite of services, including tax planning and preparation, business accounting and advisory, estate and trust consulting, and litigation support, thus helping its clients deliver efficient, forward-thinking services tailored to their financial goals.	The company was acquired by Aprio, via its financial sponsor Charlesbank Capital Partners, through an LBO on August 1, 2025 for an undisclosed amount.

## Financial Services Deals for August 2025

Company Name	Description	Deal Synopsis
Dempsey Investment Management	Provider of wealth management services intended to serve throughout Vermont and beyond. The firm offers customized investment portfolios, financial planning services, retirement check-ups, and investment management, providing clients with personalized and tailored approaches to their financial plans.	The company was acquired by Wealth Enhancement Group, via its financial sponsors Primark Capital, TA Associates Management and Onex through an LBO on August 31, 2025 for an undisclosed amount.
Evolution Partners Insurance Marketing	Operator of an insurance marketing agency intended to serve independent insurance agencies. The company offers direct carrier appointments, carrier-matching support, submissions and underwriting assistance, sales and training resources, premium finance solutions, marketing tools, and other related services, thereby enabling agencies to maintain operational control, meet carrier requirements, and manage business processes.	The company was acquired by Renaissance Group, via its financial sponsor Long Arc Capital, through an LBO on August 18, 2025 for an undisclosed amount.
Family Wealth Planning Group	Provider of wealth management services to high-net-worth families, business owners, and executives, catering to their financial planning for them. The company's wide range services includes family wealth planning, investment management, estate and tax planning, next-generation education, and more.	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 August 1, 2025 for an undisclosed amount.
First Eagle Investments	Provider of investment advisory services to private investment funds, institutional accounts, high-net-worth individuals, and financial professionals. The company is focused on fundamental, flexible, and benchmark-agnostic investing, including strategies that seek to provide clients with downside protection, thereby focusing to avoid permanent impairment of capital and invest across different asset classes, regions, industries, and market capitalization ranges.	The company was acquired by Genstar Capital through an LBO on August 15, 2025, for an undisclosed amount. The transaction values the company at an estimated \$4 billion. The transaction was supported by \$2.85 billion of debt financing.

## Financial Services Deals for August 2025

Company Name	Description	Deal Synopsis
Freedom Advisors	Provider of integrated investment management services intended to serve enterprises with financial decision-making. The company offers wealth management, financial advisory, and asset management services through a fee-based platform, thereby ensuring financial advisors get access to investment strategies that were historically available only to high-net-worth individuals and institutions.	The company was acquired by GeoWealth, via its financial sponsor Apollo Asset Management, BlackRock, Composition Capital, JP Morgan Asset Management and Kayne Anderson Capital Advisors, through an LBO on August 3, 2025 for an undisclosed amount.
Global Wealth Advisors (Lewisville)	Provider of financial planning and wealth management services intended to serve individuals and businesses. The company specializes in retirement planning, income tax planning, estate planning, risk management, corporate retirement plans, employee benefits, payroll and tax services, and business succession planning, thereby providing clients with strategies to grow, protect, and transfer wealth.	The company was acquired by Merit Financial Group, via its financial sponsor NB Capital Solutions, through an LBO on August 15, 2025 for an undisclosed amount.
Hamilton Walker Advisers	Provider of financial planning and advisory services intended for families, private clients, and emerging affluent investors in California. The company specializes in tax planning, estate planning, investment management, and personalized financial guidance, enabling clients to manage wealth and achieve long-term financial goals.	The company was acquired by Mission Wealth, via its financial sponsor Great Hill Partners, through an LBO on August 18, 2025 for an undisclosed amount.
Hessel & Associates	Provider of retirement plan consulting and third party administration services intended to serve small to mid-sized employers with 401(k), profit sharing, defined benefit and cash balance plans throughout the Midwest. The company provide customized retirement plan strategies, administrative services and specializes in qualified cash balance, defined benefit, profit sharing, thereby implementing a retirement plan strategy that meets company's or client's unique needs.	The company was acquired by Daybright Financial, via its financial sponsor Vistria Group, through an LBO on August 27, 2025 for an undisclosed amount.

## Financial Services Deals for August 2025

Company Name	Description	Deal Synopsis
Hoot Wealth	Provider of wealth management services based in Denver, Colorado. The company specializes in comprehensive financial planning, investment management, and a proprietary equity strategy, thereby helping clients grow and preserve their wealth through long-term strategies.	The company was acquired by Maridea Wealth Management, via its financial sponsors 119th Street Capital and Pelican Capital, through an LBO on August 8, 2025 for an undisclosed amount.
Innovative Insurance Group	Provider of insurance brokerage and consulting services intended to serve individuals, employees, and families across Virginia. The company offers individual insurance programs, Medicare plans, group benefits, human resources (HR) and compliance services, and benefits consulting, thereby helping clients evaluate, implement, and maintain the insurance and benefit plans of their choice.	The company was acquired by Alkeme Insurance, via its financial sponsors GCP Capital Partners and Solamere Capital, through an LBO on August 6, 2025 for an undisclosed amount.
Joseph M. Wiedemann & Sons	Provider of insurance brokerage services intended to serve individuals, families, and businesses. The company offers personal insurance, commercial insurance, and employee benefits, thereby helping clients access coverage options for risk management and protection.	The company was acquired by Relation Insurance, via its financial sponsors Aquiline and Celerity Partners, through an LBO on August 1, 2025 for an undisclosed amount.
Longbridge Wealth Advisors	Provider of financial services intended to deliver professional advice and service to the customers to plan their financial journey and reach their goals. The company provides individual services, institutional services, specialized processes, and expert advice to individuals, businesses, or non-profit organizations.	The company, a subsidiary of Ameriprise Financial, was acquired by Steward Partners Global Advisory via its financial sponsors Cynosure Partners and The Pritzker Organization , through a \$481M LBO on August 08, 2025.
Maple Life Financial	Provider of financial and life settlements services based in Bethesda, Maryland. The company offers a range of services including actuarial analysis, distressed asset value recovery, liquidity and risk analysis, legal and litigation support, product development, and transaction structuring and advisory support to its clients, thereby helping institutional investors succeed with life insurance linked assets.	The company, a subsidiary of Longevity, was acquired by Kosmos Management through an LBO on August 4, 2025 for an undisclosed amount. The transaction aims to enhance Kosmos Management's long-term capabilities and solidify its position within the evolving life settlement market.

## Financial Services Deals for August 2025

Company Name	Description	Deal Synopsis
Midtown Financial Advisors	Provider of financial planning and investment management services based in Greensboro, North Carolina. The company offers personalized service to help clients prepare for retirement, save for college, develop an estate strategy, or preserve wealth.	The company was acquired by OneDigital, via its financial sponsors New Mountain Capital and Onex, through an LBO on August 7, 2025 for an undisclosed amount.
Moirai Wealth Management	Provider of wealth management and financial advisory services intended for high-net-worth and ultra-high-net-worth individuals and families. The company offers a wide range of services, including wealth management, retirement services, tax planning, estate planning, investment planning, and family office services, thereby enabling the clients to identify and achieve their financial goals.	The company was acquired by RWA Wealth Partners, via its financial sponsor Summit Partners, through an LBO on August 15, 2025 for an undisclosed amount.
Northeast Brokerage	Operator of insurance brokerage general agency intended to offer relationship based sales assistance. The company provides services in areas of life, annuities, disability and long term care insurance, thereby helping insurance professionals and advisors to deliver quality financial protection to the people and businesses they serve.	The company was acquired by Simplicity Financial Marketing Holdings, via its financial sponsors Dragoneer Investment Group and SkyKnight Capital, through an LBO on August 19, 2025 for an undisclosed amount.
Park Piedmont	Provider of financial advisory and investment management services intended to serve individuals, families, small businesses, and non-profit organizations. The company offers fiduciary advice, asset allocation, retirement and estate planning, education funding guidance, insurance planning, and support for philanthropic goals, thereby helping clients protect, build, and share wealth in a low-cost and tax-efficient manner.	The company was acquired by Apella Wealth, via its financial sponsors Wealth Partners Capital Group and HGGC, through an LBO on August 29, 2025 for an undisclosed amount.

## Financial Services Deals for August 2025

Company Name	Description	Deal Synopsis
Pipaya Partners	Provider of transaction advisory and accounting services catering to aerospace, defense, and government contracting sectors. The company offers both sell-side and buy-side M&A services, including quality of earnings reviews, financial due diligence, accounting support, and post-transaction integration planning, thereby enabling companies and investors in the government services space to execute transaction efficiently.	The company was acquired by Prosperity Partners, via its financial sponsor Unity Partners, through an LBO on August 5, 2025 for an undisclosed amount.
Retail - Iowa	Provider of insurance services based in Des Moines, Iowa.	The company was acquired by Tricor Insurance, via its financial sponsor J.C. Flowers & Co., through an LBO in August 2025 for an undisclosed amount.
Rich Reilly Insurance Agency	Provider of insurance brokerage services intended to serve families and commercial sectors. The company offers personal and commercial insurance, thereby enabling clients to access tailored coverage across multiple needs through a single independent agency.	The company was acquired by MarketPlace 4 Insurance, via its financial sponsor Navigant Capital Partners, through an LBO on August 13, 2025 for an undisclosed amount.
Rocky Mountain Insurance Group	Provider of insurance brokerage services intended to serve individuals, families, and employers. The company specializes in health insurance, Medicare plans, life insurance, disability insurance, and employer group plans, thereby providing clients with coverage options and guidance through their insurance decisions.	The company was acquired by Inszone Insurance Services, via its financial sponsors Lightyear Capital, BHMS Investments, and Ares Management through an LBO on August 19, 2025 for an undisclosed amount.
Rogers Insurance Center	Provider of insurance services intended to support individuals and businesses. The company offers auto insurance, home insurance, life insurance, commercial insurance, and related insurance products, thereby enabling clients to obtain tailored insurance policies according to their personal needs.	The company was acquired by USI Insurance Services, via its financial sponsor Kohlberg Kravis Roberts, through an LBO on August 4, 2025 for an undisclosed amount.



## Financial Services Deals for August 2025

Company Name	Description	Deal Synopsis
S&R Insurance	Operator of an independent brokerage agency intended to serve the insurance sector. The company offers insurance products like auto, home, farm, health, life and business, enabling people to stay financially secure and wealthy.	The company was acquired by WalkerHughes Insurance, via its financial sponsor BW Forsyth Partners, through an LBO on August 26, 2025 for an undisclosed amount. The move marks WalkerHughes Insurance's first presence in south-central Missouri and reinforces its commitment to delivering service and coverage to communities across the state.
Second Half Financial Partners	Provider of financial advisory services intended to serve individual and institutional clients in the United States. The company provides financial planning, investment management, and retirement planning services, thereby helping clients achieve long-term financial goals and security.	The company was acquired by Merit Financial Group, via its financial sponsor NB Capital Solutions, through an LBO on August 8, 2025 for an undisclosed amount.
Sheets Forrest Draper Insurance	Provider of insurance services intended to serve individuals, families, and commercial businesses. The company offers personal insurance, business insurance, life and health insurance, and specialty insurance services, thereby supporting clients in managing their insurance needs and managing risk effectively.	The company was acquired by Alkeme Insurance, via its financial sponsors Solamere Capital and GCP Capital Partners, through an LBO on August 21, 2025 for an undisclosed amount.
Summit Wealth Strategies	Provider of wealth management services catering to individuals and commercial customers. The company offers a range of services, including cash flow management, retirement, business succession and estate planning, and others, enabling access to financial products and services that suit all clients' needs.	The company was acquired by Arax Investment Partners, via its financial sponsor RedBird Capital Partners, through an LBO on August 5, 2025 for an undisclosed amount.
Teneo Holdings	Provider of strategic and financial advisory services intended to serve corporations, financial institutions and organizations. The company integrates the disciplines of strategic communications, investor relations, restructuring, management consulting, physical and cyber risk, financial advisory, corporate governance advisory, ESG and talent advisory, thereby helping clients address complex business challenges and opportunities.	CVC Capital Partners sold a stake in the company to LGT Capital Partners on August 4, 2025. The transaction values the company at an estimated \$2.3 billion.

## Financial Services Deals for August 2025

Company Name	Description	Deal Synopsis
West Oak Capital	Provider of investment advisory services intended for affluent families and foundations. The company's services include tailored financial services to suit each client's specific preferences, cash needs and estate plans and separate account management for equity, balanced and fixed income portfolios, thereby helping clients with their financial goals.	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 August 28, 2025 for an undisclosed amount.
Wren Insurance Agency	Provider of personal, commercial, and specialty insurance brokerage services. The company's services include auto, homeowners, renters, boat, motorcycle, life, business, community association, and specialty policies, enabling individuals, families, businesses, and community associations with tailored protection and advocacy services through the claims process.	The company was acquired by Patriot Growth Insurance Services, via its financial sponsors GI Partners and Summit Partners, through an LBO in August 2025 for an undisclosed amount.