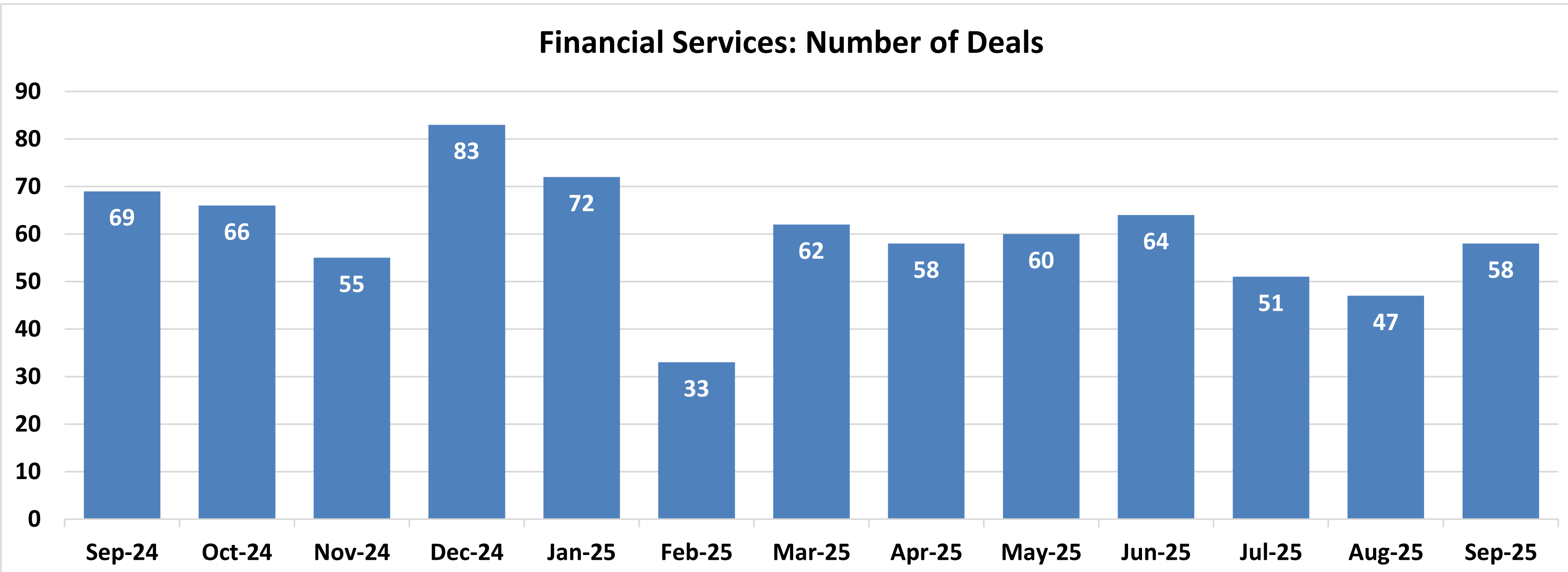
# Financial Services Deals for September 2025

**There were 58 completed U.S. private equity deals in the Financial Services sector during the month of September. The number of deal transactions were up approximately 23% from August.**

- **16% decline in the number of Financial Services deals compared to September 2024**
- **32 deals closed within the Other Financial Services Industry Group, leading the sector**



# Financial Services Deals for September 2025

| Company Name | Description | Deal Synopsis |
|---|---|---|
| Abercrombie, Simmons & Gillette | Provider of claims management, administration and settlement services intended for insurance companies, defense firms, major general agencies and risk management firms. The company specializes in claims investigation and administration services and provides prompt, professional and personalized claims services including risk management, claims investigation and management system services, enabling insurance companies, defense firms, major general agencies and risk management firms with general liability claim, worker's compensation claim, motor vehicle claim, property claim and catastrophe claim services. | The company was acquired by Avondale Risk, via its financial sponsor Aquiline, through an LBO on September 2, 2025 for an undisclosed amount. The acquisition gives Avondale Risk access to new markets across Texas, Louisiana, Mississippi, and Alabama, deepening its expertise in public entity workers' compensation, general liability, and adding robust bill review capabilities in those geographies to its service portfolio. |
| Alliance Brokerage | Provider of commercial insurance brokerage services intended to support property and casualty clients. The company provides business insurance, personal insurance, employee benefits, life insurance, health insurance, and disability insurance, thereby helping clients manage risk and secure benefits tailored to their needs. | The company was acquired by Alkeme Insurance, via its financial sponsors Apollo Asset Management, Solamere Capital and GCP Capital Partners, through an LBO on September 25, 2025 for an undisclosed amount. |
| ALTUS Commercial Receivables | Provider of commercial debt recovery services intended to help leading companies streamline and improve their entire order-to-cash cycle. The company operates as a comprehensive, full-service, commercial receivable management agency offering receivable management outsourcing, domestic and international commercial collections, audit collection, and business receivable management training, enabling clients to reduce operating costs and improve performance by outsourcing specific non-core processes. | The company was, a subsidiary of Brown & Joseph, acquired by Astira Capital Partners through an LBO on September 18, 2025 for an undisclosed amount. |
| Arkansas Best Insurance | Provider of insurance products and services intended for personal and commercial coverage. The company offers auto, home, life, health, flood, earthquake, and recreational vehicle insurance for individuals, as well as business owner policies, general liability, workers' compensation, and cyber liability for businesses thereby providing access to multiple insurance carriers. | The company was acquired by Inszone Insurance Services, via its financial sponsors Ares Capital, BHMS Investments, Ares Management, and Lightyear Capital, through an LBO on September 25, 2025 for an undisclosed amount. |

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| Company Name | Description | Deal Synopsis |
|---|---|---|
| Beacon Benefits (Other Financial Services) | Provider of retirement plan administration services intended to simplify plan management for small and mid-sized employers. The company offers plan design, implementation, compliance testing, government reporting, actuarial, and administrative services, enabling business owners to maintain retirement benefits that meet regulatory standards and support workforce financial well-being. | The company was acquired by PCS Retirement, via its financial sponsors PennantPark and Lee Equity Partners, through an LBO on September 11, 2025 for an undisclosed amount. |
| Beasley-Keith Insurance Agency | Provider of insurance services intended to serve individuals, families, and businesses. The company offers auto insurance, home insurance, commercial insurance, flood insurance, condo insurance, renters insurance, and umbrella insurance, thereby assisting in identifying needs and problems, while recommending a customized plan. | The company was acquired by Tropolis, via its financial sponsor Unity Partners, through an LBO on September 3, 2025 for an undisclosed amount. |
| BeckWay | Provider of private equity consulting and executive search services intended to support financial sponsors and portfolio companies. The company provides consulting services in advanced analytics, enterprise transformation, finance and analytics, human resources, operations, procurement, integrated business planning, revenue and margin, supply chain and logistics, technology, and transaction advisory, thereby assisting financial sponsors and portfolio companies in improving operational performance. | The company was acquired by Frontenac Company, Mr. Mark Habner, Mr. Thomas Anderson and its management through an LBO on September 24, 2025 for an undisclosed amount. |
| Brady Benefits & Associates | Provider of health benefits insurance and consulting services for employers and families. The company provides family insurance plans, retirement benefits, and account services, including HSA, FSA, HRA, and MSA, along with plan implementation, renewal oversight, COBRA administration, and wellness programs, enabling employers and families to achieve efficient benefits administration and improved financial security. | The company was acquired by WalkerHughes Insurance, via its financial sponsor BW Forsyth Partners, through an LBO on September 16, 2025 for an undisclosed amount. |

# Financial Services Deals for September 2025

| Company Name | Description | Deal Synopsis |
|---|---|---|
| Brass Tax Wealth Management | Provider of wealth management services intended for high-net-worth individuals. The company offers investment management, tax strategies and financial planning tailored to the needs of individual clients. | The company was acquired by Waverly Advisors, via its financial sponsors Wealth Partners Capital Group, HGGC, and Ares Management, through an LBO on September 12, 2025 for an undisclosed amount. |
| Breakout | Operator of a trading platform intended for crypto native proprietary trading on the better-centralized exchange liquidity. The company offers an execution model and user-friendly interface, giving traders the tools and environment they need to thrive and provide trading opportunities in a variety of crypto assets with a centralized exchange setup, enabling users to make trading efficient and effective. | The company was acquired by Kraken, via its financial sponsor Preva Capital, through a $1.96 million LBO on September 1, 2025. |
| Canopy Insurance Group | Provider of insurance brokerage services intended to serve businesses and individuals. The company specializes in business, personal, and risk management, including commercial property, commercial auto, cybersecurity, workers' compensation, executive risk, homeowners, and other insurances, enabling businesses to utilize the efficiencies and quality of service. | The company was acquired by Tropolis, via its financial sponsor Unity Partners, through an LBO on September 3, 2025 for an undisclosed amount. |
| Cirrus Asset Management | Operator of residential and commercial property management services based in Woodland Hills, California. The company oversees leasing, maintenance and tenant relations for apartment communities and office spaces, thereby supporting property owners with full-service asset management. | The company was acquired by Oakline Properties, via its financial sponsor Alpine Investors, through an LBO on September 25, 2025 for an undisclosed amount. |

# Financial Services Deals for September 2025

| Company Name | Description | Deal Synopsis |
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| DataScan (Alpharetta) | Provider of wholesale financing and inventory risk management services intended to manage the entire loan lifecycle conveniently. The company offers various services such as wholesale servicing and accounting, credit underwriting, commercial loan origination, collateral risk management, asset financing, and other related services through data-driven proprietary platform, thereby helping its clients in the equipment and automotive finance sectors operate more efficiently, adapt to evolving business needs, and make informed decisions. | The company, a subsidiary of JM Family Enterprises, was acquired by Solifi, via its financial sponsors Thoma Bravo, Omega Venture Partners and TA Associates Management, through an LBO on September 23, 2025 for an undisclosed amount. The acquisition extends Solifi's automotive offering and Open Finance Platform technology with proven, modern wholesale solutions. |
| Don Ramatici Insurance | Provider of insurance products and services intended to provide commercial, personal, farm, and specialty risk coverage. The company's platform delivers tailored policy options, carrier partnerships, claims management support, and risk assessment services, enabling business and individual clients to secure comprehensive coverage with clarity and cost efficiency in their markets. | The company was acquired by Hub International, via its financial sponsors Alpha Wave Global, Altas Partners, Blackstone, Finback Investment Partners, Hellman & Friedman, Leonard Green & Partners, T. Rowe Price Group and Temasek Holdings, through an LBO in September 2025 for an undisclosed amount. |
| Eagle Wealth Management | Provider of fiduciary financial planning and investment advisory services intended to assist clients in managing retirement and wealth planning. The company offers financial planning, portfolio management, and tax-related services, and other related services, thereby enabling individuals to organize and manage long-term financial matters. | The company was acquired by Mercer Advisors, via its financial sponsor Genstar Capital, Harvest Partners, NB Capital Solutions, Altas Partners and Oak Hill Capital through an LBO on September 2, 2025 for an undisclosed amount. |
| Entrust Insurance (Saint Clair Shores) | Operator of an insurance agency intended to offer insurance coverage to people. The company offers a variety of insurance options, including auto, homeowner, boat, motorcycle, business, and liability insurance, enabling customers to avail all the necessary insurance coverage under one roof. | The company was acquired by Tropolis, via its financial sponsor Unity Partners, through an LBO on September 3, 2025 for an undisclosed amount. |

# Financial Services Deals for September 2025

| Company Name | Description | Deal Synopsis |
|---|---|---|
| Ferrentino & Associates | Provider of professional financial and advisory services designed to support individuals and businesses with strategic planning and compliance needs. The company offers informative content, interactive tools, and access to curated external resources, enabling clients to make informed financial decisions and enhance their financial management. | The company was acquired by Modera Wealth Management, via its financial sponsor TRIA Capital Partners, through an LBO on September 03, 2025 for an undisclosed amount. |
| Financial Risk Group | Provider of risk analytics and data management consulting services intended for blue-chip domestic and international financial institutions, insurance companies and other commercial customers. The company's services include strategy, data management, process and software selection advisory services, software implementation services, ongoing business analytics and technical support and cloud-based hosting managed services supported by its proprietary risk modeling software, thereby maximizing its clients' abilities to analyze and manage risks in their business offerings and maintain strict regulatory compliance. | The company received $14 million of development capital from Main Street Capital on September 23, 2025. As a result of the transaction, the company was recapitalized. The transaction was supported by an undisclosed amount of debt financing. |
| FinQuery | Developer of an artificial intelligence-driven software-as-a-service platform designed to unify finance, accounting, and informative technology. The company's software is an AI-enabled, cloud-based system that calculates the right-of-use asset and lease liability hence reducing costs, increasing efficiency, and minimizing risk, enabling accountants and professionals to eliminate errors when transitioning to the new lease accounting standards. | The company was acquired by TA Associates Management and its management through an LBO on September 30, 2025 for an undisclosed amount. The investment will support the company's expansion into new capabilities, continued product innovation, and strategic growth initiatives to broaden the platform through both organic development and acquisitions. |
| Furey | Provider of accounting and finance services intended to support high-growth, venture-backed startups. The company provides payroll services, budgeting, reporting, financial planning, and analysis, thereby helping organizations manage their financial operations and reporting efficiently. | The company was acquired by Graphite Financial, via its financial sponsor Red Iron Group, through an LBO on September 23, 2025 for an undisclosed amount. |

# Financial Services Deals for September 2025

| Company Name | Description | Deal Synopsis |
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| GCD Advisors | Provider of income tax planning and preparation services intended for individuals and families. The company offers investment management, tax integration, and financial strategies, enabling individuals, families, business owners, and retirees to simplify their finances and make informed decisions while minimizing tax burdens. | The company was acquired by Carson Group, via its financial sponsor Bain Capital, through an LBO on September 22, 2025 for an undisclosed amount. |
| GCG Wealth Management | Provider of wealth management, asset management, investment advisor and risk management intended for the financial services sector. The company offers financial planning, estate, gift and trust planning, wealth coach & education, cash flow and retirement planning and risk management and insurance strategies, helping clients find a way to improve their financial health. | The company received an undisclosed amount of development capital from BharCap Partners on September 10, 2025. As a result of the transaction, the company was recapitalized. The partnership aims to enhance the company's growth strategies and accelerate its acquisition plans, facilitating a more robust platform for financial advisors. |
| GlobalGreen Insurance Agency | Provider of insurance services intended to meet the diverse needs of individuals and businesses. The company offers a comprehensive range of insurance products, including coverage for homes, automobiles and businesses, as well as life and disability plans, enabling a broad clientele to access personalized and competitive insurance solutions from multiple carriers, intending to provide financial security. | The company was acquired by Brightway Insurance, via its financial sponsor GrowthCurve Capital, through an LBO on September 3, 2025 for an undisclosed amount. |
| Gotham Brokerage | Provider of customized insurance services intended for condominium, co-op, and apartment owners. The company offers tailored quotes, policy binding, and suitable guidance across apartment insurance, enabling individuals and families to have efficient protection with local expertise. | The company was acquired by Alkeme Insurance, via its financial sponsors Solamere Capital, GCP Capital Partners and Apollo Asset Management, through an LBO on September 18, 2025 for an undisclosed amount. The acquisition enhances Alkeme Insurance's personal insurance capabilities and adds a strategic foothold in one of the nation's most dynamic insurance markets. |

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| Company Name | Description | Deal Synopsis |
|---|---|---|
| GPS Insurance | Distributor of health insurance and related products in Florida. The company offers Medicare, ACA (Affordable Care Act) plans, dental and vision insurance and other health-related insurance products, aiming to help individuals navigate the complexities of health coverage. | The company was acquired by Cresso Health, via its financial sponsor Cypress Ridge Capital, through an LBO on September 5, 2025 for an undisclosed amount. |
| Gravitas Insurance Agency | Provider of specialized insurance services intended for risk management and financial protection purposes. The company offers tailored coverage, expert advisory services, and responsive claims handling, thereby enabling businesses and individuals reliable protection against unforeseen events. | The company was acquired by Howden Group Holdings, via its financial sponsors Caisse de dépôt et placement du Québec, General Atlantic and Hg through an LBO on September 18, 2025 for an undisclosed amount. |
| Graypoint | Provider of financial advisory and investment management services to individuals and businesses. The company provides wealth management and fiduciary services, thereby supporting families, executives, and nonprofits with financial planning. | The company was acquired by Cerity Partners, via its financial sponsors Harvest Partners and Genstar Capital, through an LBO on September 5, 2025 for an undisclosed amount. |
| Gryphon Advisors (Financial Services) | Provider of financial planning services intended to help clients address short- and long-term concerns. The company's services include tax, retirement, insurance, investment, cash flow and estate planning and business consulting. | The company was acquired by Savant Capital., via its financial sponsors Kelso & Company, Cynosure Partners, Kingsway Financial Services and Nonami Investments, through an LBO on September 30, 2025 for an undisclosed amount. |
| High Desert Insurance & Financial Services | Provider of insurance services based in Bend, Oregon. The company offers comprehensive coverage options, including auto, home, health, life, and business insurance, enabling its clients to buy insurance that suits them best. | The company was acquired by Inszone Insurance Services, via its finanicial sponsors BHMS Investments, Lightyear Capital and Ares Management, through an LBO on September 9, 2025 for an undisclosed amount. |
| Infiniti Insurance Services | Operator of an insurance agency intended to help clients reach their financial security goals. The company offers a range of insurance coverages, including auto, homeowner, health, business, personal, and life insurance, enabling customers to get coverage at a low rate. | The company was acquired by Tropolis, via its financial sponsor Unity Partners, through an LBO on September 3, 2025 for an undisclosed amount. |

# Financial Services Deals for September 2025

| Company Name | Description | Deal Synopsis |
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| Insurance Brokers of Arizona | Operator of an insurance agency intended to offer personal, commercial, and life insurance to individuals, families, and businesses. The company offers auto, home, business, specialty, and cyber insurance, as well as Medicare supplement and life insurance, enabling Arizona-based individuals and businesses to secure appropriate and cost-effective insurance protection. | The company was acquired by Alkeme Insurance, via its financial sponsors Solamere Capital, GCP Capital Partners and Apollo Asset Management, through an LBO on September 30, 2025 for an undisclosed amount. |
| King Phillips Insurance | Provider of comprehensive insurance services based in Houston, Texas. The company offers protection for your auto, home, health, business, and life insurance, aiming to assist clients in identifying needs and problems by putting together a customized plan as per their needs. | The company was acquired by Tropolis, via its financial sponsor Unity Partners, through an LBO on September 3, 2025 for an undisclosed amount. |
| KSDT | Provider of accounting and advisory services intended to support businesses across construction, real estate, financial services, hospitality, and other industries. The company offers a range of services, including wealth management, property management, business accounting, tax services, financial reporting, credits and incentives, and audit and review services, enabling clients to manage their finances effectively and achieve long-term stability. | The company was acquired by Ascend Partner Services, via its financial sponsor Alpine Investors, through an LBO on September 1, 2025 for an undisclosed amount. |
| L. H. Griffith & Company | Provider of insurance brokerage services intended for commercial and personal risk protection purposes. The company offers coverage in trucking, auto, homeowners, life, commercial, and special events insurance lines, enabling individuals and businesses to access tailored policies. | The company was acquired by King Insurance Partners, via its financial sponsors BHMS Investments and Lightyear Capital, through an LBO on September 23, 2025 for an undisclosed amount. |

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| Company Name | Description | Deal Synopsis |
|---|---|---|
| Lexington Insurance Agency | Operator of an insurance brokerage firm intended to serve the individuals, families, and businesses in the region. The company offers auto, home, health, life, and business insurance, thereby helping its clients to understand their options when determining the best possible coverage at the most competitive pricing. | The company, a subsidiary of an undisclosed investor, was acquired by Inszone Insurance Services, via its financial sponsors BHMS Investments, Ares Management, and Lightyear Capital, through an LBO on September 16, 2025. This acquisition marks Inszone Insurance Services's entrance into the Kentucky market and continues the company's momentum of expanding its presence across the Midwest and Southeast. |
| Merchant Industry | Provider of marketing and sales services intended for credit card processing companies. The company offers credit card processing equipment, customer service and technical support to the merchants on behalf of the credit card processing companies and financial institutions, providing merchants with quality credit card processing services. | The company was acquired by Lovell Minnick Partners through an LBO on September 19, 2025, for an undisclosed amount. The transaction was supported by debt financing. |
| Merit Insurance Services | Operator of an insurance brokerage company intended to serve insurance professionals, financial planners, and investment advisors. The company offers Medicare, long-term care, life insurance, disability insurance, annuities, and senior benefits, providing services, education, sales ideas, and support to its clients. | The company, a subsidiary of Integrity Marketing Group, was acquired by Acera Insurance, via its financial sponsor Clairvest Group, through an LBO on September 1, 2025 for an undisclosed amount. |
| Moser Wealth Advisors | Provider of wealth and tax advisory services intended to help clients manage and grow their finances. The company offers guidance on investments, retirement planning, and tax strategies, enabling individuals and businesses to build wealth, reduce liabilities and achieve long-term financial security. | The company was acquired by Beacon Pointe Advisors, via its financial sponsor Kohlberg Kravis Roberts, through an LBO on September 1, 2025 for an undisclosed amount. |
| Next Retirement Solutions | Provider of retirement planning and wealth advisory services catering to companies, organizations, and individuals. The company offers a range of services, including retirement plan consulting, investment management, financial planning, cash management, and asset management. | The company was acquired by Concurrent Advisors, via its financial sponsor Merchant Investment Management, through an LBO on September 10, 2025 for an undisclosed amount. The acquisition would cross-pollinate Concurrent's institutional business with it's retail business. |

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| Company Name | Description | Deal Synopsis |
|---|---|---|
| Parker-Haskins Insurance | Operator of a insurance agency based in Dodge City, Kansas. The company offers a range of personal, business, health, farm, life insurances, thereby providing its customers with optimal insurance products and services using interactive risk assessment techniques. | The company was acquired by Inszone Insurance Services, via its financial sponsors Lightyear Capital, BHMS Investments and Ares Management, through an LBO on September 23, 2025 for an undisclosed amount. |
| Prehmus Financial Partners | Provider of comprehensive financial planning and investment management intended to give clients financial peace of mind by protecting and growing wealth. The company offers counsel on investments, retirement income, risk management, and tax planning strategies, positioning families and individuals to pursue their financial goals with a clear view towards the future. | The company was acquired by BIP Wealth through an LBO on September 30, 2025 for an undisclosed amount. |
| Professional Planning Services | Provider of financial planning services intended for high-income earners, professionals in the pharmaceutical industry, families with college-bound students, and small business owners. The company offers legacy planning, Medicare advice, life insurance, personalized investment management strategies, and retirement planning, thereby helping its clients map out a plan to reach their financial goals and dreams. | The company was acquired by Simplicity Financial Marketing Holdings, via its financial sponsors SkyKnight Capital and Dragoneer Investment Group, through an LBO on September 17, 2025 for an undisclosed amount. |
| Public Safety Financial/Galloway | Provider of specialized financial planning and investment advisory services intended to support public safety professionals and allied clients. The company offers a range of financial advisory services, including retirement planning, pension-maximization strategy, investment management, survivor assistance, benefit guidance, and training programs, thereby providing police, fire, and government employees and their families with the tools to optimize their financial readiness, secure benefits, and plan confidently for the future. | The company was acquired by Modern Wealth Management, via its financial sponsor Crestview Partners, through an LBO on September 4, 2025 for an undisclosed amount. |

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| Company Name | Description | Deal Synopsis |
|---|---|---|
| Retter Capital Management | Provider of financial planning and investment advisory services intended for individuals and families. The company offers fiduciary guidance, investment management, and comprehensive financial planning services, including tax, retirement, education, estate, and insurance planning, serving individuals and families seeking to manage and grow their wealth. | The company was acquired by Mission Wealth, via its financial sponsor Great Hill Partners, through an LBO on September 16, 2025 for an undisclosed amount. |
| Safe Harbor Insurance | Provider of a wide range of personal and commercial insurance services intended for individuals, families, and small to mid-sized businesses seeking reliable and accessible insurance solutions. The company offers auto, home, business, life, and health coverage, alongside online tools for policy changes, claims reporting, and payments. | The company was acquired by Tropolis, via its financial sponsor Unity Partners, through an LBO on September 3, 2025 for an undisclosed amount. |
| SBK Insurance | Operator of an insurance agency across the Southeastern United States. The company offers a wide range of personal, commercial, life, health, and transportation insurance services, aiming to serve individuals and businesses with personalized attention and industry expertise. | The company of SmartBank was acquired by Greater Sum Ventures through an LBO on September 5, 2025 for an undisclosed amount. |
| Select Portfolio Management | Provider of integrated wealth and financial advisory services. The firm offers personalized financial planning, investment portfolio management, including tactically-managed and advisor-managed options, retirement, tax, and estate strategies, thereby enabling clients to pursue and achieve their long-term financial goals. | The company was acquired by Signature Estate & Investment Advisors, via its financial sponsor Reverence Capital Partners, through an LBO on September 2, 2025 for an undisclosed amount. |
| Shilanski & Associates | Provider of financial planning services intended for individuals and businesses. The company offers comprehensive financial planning services, including cash flow management, retirement planning, investment planning, financial risk management, insurance planning, tax planning, estate planning, and business planning, thereby prioritizing clients' goals and building a solid foundation before designing a financial plan to pursue those goals. | The company was acquired by Carson Group, via its financial sponsor Bain Capital, through an LBO on September 30, 2025 for an undisclosed amount. |

# Financial Services Deals for September 2025

| Company Name | Description | Deal Synopsis |
|---|---|---|
| Solar Services ( Loan Servicing Operations) | Provider of loan services across Maryland, United States. | The company, a subsidiary of Mosaic, was acquired by Forbright Bank via its financial sponsors Bayview Asset Management, BlackRock, Centerbridge Partners, Gallatin Point Capital, and Galvanize Climate Solutions, through an LBO on September 22, 2025. |
| Stax | Provider of commercial due diligence, value creation and exit planning analysis services intended for investment banks, private equity firms and PE-backed companies. The company specializes in strategic decisions, implementing data and analytics systems, enabling firms to drive growth, enhance profits, increase value and make better investment decisions. | The company was acquired by Grant Thornton, via its financial sponsors Caisse de dépôt et placement du Québec, New Mountain Capital and Ottawa Avenue Private Capital, through an LBO on September 23, 2025 for an undisclosed amount. |
| Steele Benefit Services | Provider of benefits engagement, enrollment, and administration services intended to streamline and personalize the employee benefits experience for employers, brokers, and carriers. The company's services combine tailored multi-channel communications, enrollment support, and compliance services, enabling employees with seamless, human-centered benefits delivery. | The company was acquired by Selerix Systems, via its financial sponsor NexPhase Capital, through an LBO on September 4, 2025 for an undisclosed amount. |
| Summit Financial Advisors | Provider of independent financial advisory services intended for individuals. The company offers fiduciary investment guidance, tax-efficient strategies, and retirement planning, enabling U.S. clients to align financial resources with long-term life goals. | The company was acquired by MAI Capital Management through an LBO on September 12, 2025 for an undisclosed amount. |
| The Family Firm | Provider of financial planning and investment management intended to help families make confident, long-term decisions. The company specializes in personalized financial advisory services through data-driven strategies, behavioral finance, and transparent communication, enabling clients to align their money with their values and navigate transitions with control. | The company was acquired by Beacon Pointe Advisors, via its financial sponsor Kohlberg Kravis Roberts, through an LBO on September 15, 2025 for an undisclosed amount.. |

# Financial Services Deals for September 2025

| Company Name | Description | Deal Synopsis |
|---|---|---|
| Ultra Financial Partners | Provider of financial planning and investment advisory services intended to serve individuals and families across the United States. The company offers personalized retirement planning, tax-efficient investment strategies and wealth management guidance, thereby helping clients achieve long-term financial stability and informed decision-making. | The company was acquired by Mariner Wealth Advisors through an LBO on September 30, 2025 for an undisclosed amount. |
| Upper Peninsula Insurance Agency | Operator of an insurance agency intended to serve across Northern Michigan and Wisconsin. The company offers services including personal insurance, business insurance, health insurance, and Medicare, thereby helping clients protect their health and wealth. | The company was acquired by Tropolis, via its financial sponsor Unity Partners, through an LBO on September 3, 2025 for an undisclosed amount. |
| Warrendale Insurance Agency | Provider of multiline personal and commercial coverage services intended for the protection of individuals and businesses. The company offers multiple insurance services, including auto, homeowners, business, landlord, fire, boat, health and life insurance, thereby providing a range of choice of coverage, benefits and payment options by representing several insurance companies. | The company was acquired by Tropolis, via its financial sponsor Unity Partners, through an LBO on September 3, 2025 for an undisclosed amount. |
| Wells Trecaso Financial Group | Provider of investments and financial planning services based in Akron, Ohio. The company offers a wide range of services, including financial planning, estate planning, tax planning, business planning, retirement planning, and investment management to advisors, thereby enabling clients to maintain stable financial wealth. | The company was acquired by Carson Group, via its financial sponsor Bain Capital, through an LBO on September 18, 2025 for an undisclosed amount. |
| Yodlee | Developer of a data aggregation and analytics platform intended to help people live financial lives accordingly. The company's platform offers wealth management, retail banking, risk management and other related services designed for retail banking, credit and lending and open banking, enabling clients to meet the organization's specific needs. | The company was acquired by STG Partners through an LBO on September 2, 2025 for an undisclosed amount. |