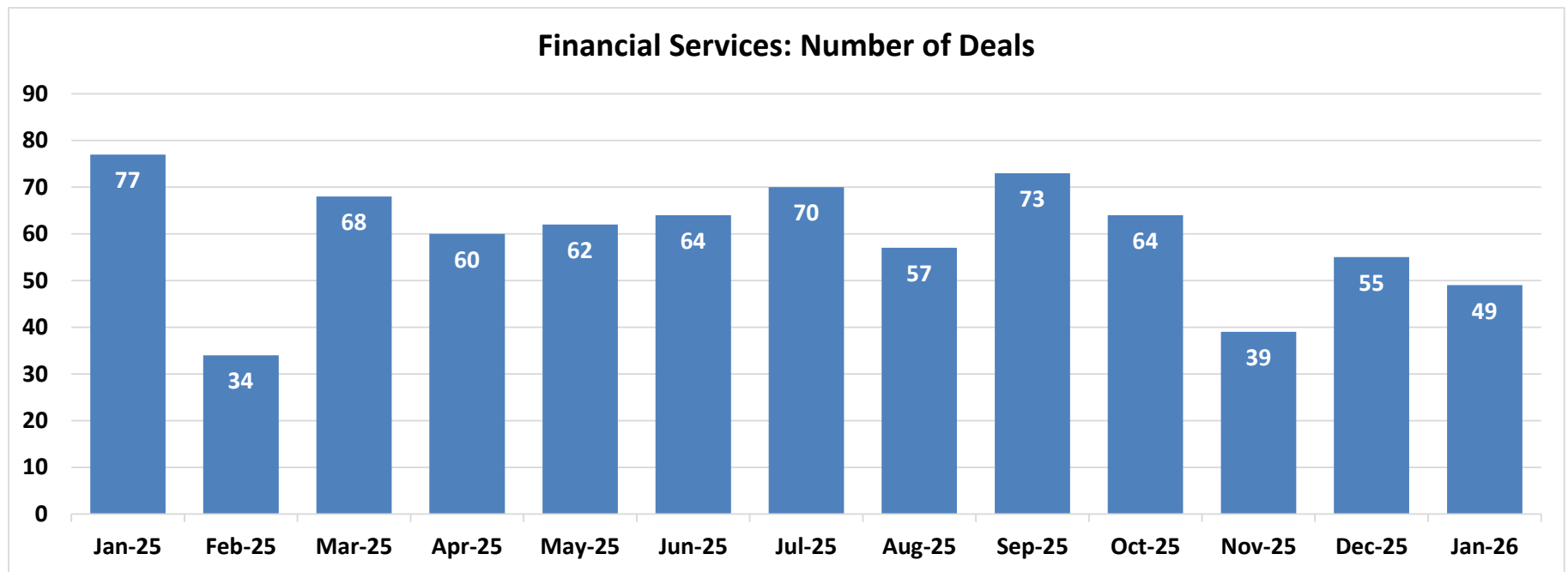


## Financial Services Deals for January 2026

There were 49 completed U.S. private equity deals in the Financial Services sector during the month of January. The number of deal transactions were down approximately 11% from December. There was a 36% decline in the number of Financial Services deals compared to January 2025.



## Financial Services Deals for January 2026

Company Name	Description	Deal Synopsis
Clarius Group	Provider of investment management services intended to serve individuals and institutional investors. The company offers aggregate reporting, credit support, cash flow management, risk management coordination, direct indexing solutions and portfolio design, enabling clients to manage all the steps required to keep their financial life secure and in order.	The company was acquired by Clearstead Advisors, via its financial sponsor Flexpoint Ford, through an LBO on January 31, 2026 for an undisclosed amount.
Janney (Financial Services Division)	Operator of a financial services business based in the United States. The company specializes in depository and insurance investment banking, equity research, and institutional equity sales.	The company, a subsidiary of Janney, was acquired by Brean Capital, via its financial sponsors Quadrant Management and Hunt Companies, through an LBO on January 30, 2026 for an undisclosed amount.
Longview Asset Management (Santa Fe)	Provider of sustainable (ESG) wealth and asset management services serving individuals, families, trusts, and institutions. The company offers services such as portfolio management, financial planning, retirement plans, and other related services.	The company was acquired by EP Wealth Advisors, via its financial sponsor Berkshire Partners, through an LBO on January 30, 2026 for an undisclosed amount.
Pure Portfolios	Provider of fiduciary wealth management services serving households across the United States. The company uses evidence-based investing, rules-driven portfolio management, and integrated retirement, tax, and estate planning delivered with a clear fee structure, thereby helping clients manage risk and improve long-term financial outcomes.	The company was acquired by Waverly Advisors, via its financial sponsors Wealth Partners Capital Group, Ares Capital Corporation BDC, HGGC and Ares Management, through an LBO on January 30, 2026 for an undisclosed amount.
Palmer & Cay	Provider of specialty commercial insurance brokerage and employee benefits services intended for middle-market and large corporate clients. The company offers property and casualty insurance, risk management, and claims advocacy, thereby helping organizations manage complex risks effectively.	The company was acquired by Third Wave Insurance, via its financial sponsor TPG, through an LBO on January 29, 2026 for an undisclosed amount.
Clark Insurance Agency (Ballwin)	Operator of an insurance agency intended to serve individuals, families, and businesses. The agency offers personal insurance for homes, automobiles, possessions, and liability.	The company was acquired by WalkerHughes Insurance, via its financial sponsor BW Forsyth Partners, through an LBO on January 27, 2026 for an undisclosed amount.

## Financial Services Deals for January 2026

Company Name	Description	Deal Synopsis
Edgewater Financial Group	Provider of personalized consulting services to businesses. The company offers fiscal and management operations - ranging from bookkeeping to tax, and CFO-level operational consulting services.	The company was acquired by Axis Insurance Managers, via its financial sponsors Lee Equity Partners, through an LBO on January 27, 2026 for an undisclosed amount.
Inman Insurance	Provider of insurance brokerage services intended to provide personal and commercial insurance products. The company offers auto, home, life, health, Medicare, and commercial insurance policies, enabling clients to customize coverage and reliable risk management.	The company was acquired by WalkerHughes Insurance, via its financial sponsor BW Forsyth Partners, through an LBO on January 27, 2026 for an undisclosed amount.
PBL Wealth Management	Provider of financial planning and wealth management services designed to support high-income professionals and business leaders with complex financial decisions. The company's financial advisory operations include investment management, tax-aware planning, retirement planning, equity compensation planning, and risk management, enabling clients to integrate income, wealth, and benefit strategies in support of long-term financial goals.	The company was acquired by Mission Wealth, via its financial sponsor Great Hill Partners, through an LBO on January 27, 2026 for an undisclosed amount.
The Hilb Group (Full Service Insurance Agency in Virginia)	Provider of insurance services based in Virginia, United States. The company offers property and casualty as well as employee benefits insurance.	The company was acquired by The Hilb Group, via its financial sponsor The Carlyle Group, through an LBO on January 27, 2026 for an undisclosed amount.
National Pool Partners	Operator of a holding company specialized in swimming pool cleaning, maintenance and repair services. The company acquires and partners with local businesses and pool service companies by providing the resources of national enterprises, thereby enabling residential and commercial clients to improve the quality of customer service and career opportunities for employees.	The company was acquired by Certus Pest, via its financial sponsor Imperial Capital Group, through an LBO on January 26, 2026 for an undisclosed amount.
TL Financial Group	Provider of financial planning and retirement advisory services based in Southgate, Michigan. The company offers holistic income strategies, retirement planning, and access to a range of financial and insurance resources for individuals residing in the United States.	The company was acquired by Merit Financial Advisors, via its financial sponsors Wealth Partners Capital Group, HGGC and NB Capital Solutions, through an LBO on January 23, 2026 for an undisclosed amount.

## Financial Services Deals for January 2026

Company Name	Description	Deal Synopsis
Besler	Developer of revenue recovery and hospital reimbursement software designed to obtain accurate reimbursement and optimize sales. The company's platform offers various features for cost report reviews and preparation, organ acquisition, Medicare underpayments, regulatory analysis, auditing, and other related services, thereby helping its clients enhance and protect their revenue effectively.	The company was acquired by Kodiak Solutions, via its financial sponsor TPG, through an LBO on January 22, 2026 for an undisclosed amount. The acquisition further enhances the Kodiak Solutions' platform that hospitals, health systems, and medical practices rely on for net revenue reporting, revenue cycle benchmarking, analytics, and healthcare business office automations.
Brokers Holding Group	Operator of health insurance and employee benefit brokerage firm intended for brokers and employer groups in Georgia and the Carolinas. The company offers level funded medical plans, MEC plans, ancillary coverage and broker support for presentations, enrollments and renewals to help partners deliver suitable coverage options.	The company was acquired by Warner Pacific Insurance Services, via its financial sponsor Lovell Minnick Partners, through an LBO on January 22, 2026 for an undisclosed amount.
Altimeter Solutions Group	Provider of end-to-end managed repair and claims lifecycle services intended to serve property and casualty insurance carriers. The company offers claims intake and triage, repair scope assessment, contractor network coordination, job and repair management, and quality assurance oversight, enabling structured handling of property damage claims from initial assessment through repair completion.	The business division of Alacrity Solutions, was acquired by BV Investment Partners through an LBO on January 21, 2026 for an undisclosed amount.
Herbein Financial Group	Provider of a financial advisory firm designed to guide individuals and organizations in building and preserving long-term financial well-being. The company offers personalized wealth planning, retirement plan administration, and fiduciary guidance, enabling individuals, businesses, and retirement plan sponsors to make informed decisions and achieve lasting financial security.	The company was acquired by Choreo (Other Financial Services), via its financial sponsor Parthenon Capital Partners, through an LBO on January 21, 2026 for an undisclosed amount.

## Financial Services Deals for January 2026

Company Name	Description	Deal Synopsis
Stock & Option Solutions	Provider of outsourced equity plan administration services intended to support corporate equity compensation operations and compliance for business clients. The company engages in outsourced equity compensation administration and related project-based services, staffing support, year-end compliance reporting, and strategic equity program advisory, thereby enabling corporate clients to streamline stock plan processes and maintain accurate, audit-ready operations.	The company was acquired acquired by Allshares, via its financial sponsor Bregal Milestone, through an LBO on January 21, 2026 for an undisclosed amount.
The Bond Exchange	Provider of surety bond brokerage and advisory services intended to serve business clients across multiple industries in the United States. The company specializes in surety bond placement, contract bond brokerage, license and permit bond assistance, regulatory compliance bonding support, and commercial bond services, thereby enabling access to financial guarantee arrangements required for contractual and regulatory obligations.	The company was acquired by EPIC Insurance Brokers & Consultants, via its financial sponsors Ardian, Harvest Partners and The Carlyle Group, through an LBO on January 21, 2026 for an undisclosed amount.
Bradshaw Rogers Financial Partners	Provider of financial planning and wealth management services intended to serve individuals, families, and small business owners. The company specializes in retirement planning, investment and risk management, financial and tax planning, estate planning, and health and insurance planning, thereby enabling personalized financial guidance and coordination of long-term financial goals.	The company was acquired by Prime Capital Financial, via its financial sponsor Abry Partners, through an LBO on January 20, 2026 for an undisclosed amount.
Grunden Financial Advisory	Provider of financial planning and investment management services intended to provide financial guidance. The company offers wealth management services, financial planning, investment planning, relationship management and financial advisory services, thereby helping clients to achieve financial security and prosperity.	The company was acquired by Allworth Financial, via its financial sponsors Ontario Teachers' Pension Plan and Lightyear Capital, through an LBO on January 20, 2026 for an undisclosed amount.

## Financial Services Deals for January 2026

Company Name	Description	Deal Synopsis
Florida Insurance	Provider of insurance brokerage services intended to serve individuals and businesses in Florida. The company offers personal and commercial insurance products, including auto, home, life, and liability coverage, thereby helping clients secure tailored protection at competitive rates.	The company was acquired by Trucordia, via its financial sponsors Blue Owl Capital, Crescent Capital Group, HGGC and The Carlyle Group, through an LBO on January 15, 2026 for an undisclosed amount.
Bellwether Insurance Group	Provider of commercial insurance brokerage and risk management services intended to protect organizations from financial, operational, and regulatory risk. The company delivers tailored risk assessments, policy placement, claims support, and ongoing advisory services, enabling small and mid-sized businesses to secure comprehensive coverage, improve resilience, and operate with reduced exposure to uncertainty.	The company was acquired by Alkeme Insurance, via its financial sponsors Solamere Capital and GCP Capital Partners, through an LBO on January 14, 2026 for an undisclosed amount.
Health Connect Insurance Agency	Provider of health insurance brokerage services intended to assist individuals and families with selecting and enrolling in health insurance plans. The company engages in health insurance brokerage by educating consumers about plan options, assisting with enrollment paperwork, and providing ongoing support through licensed agents, thereby enabling individuals and families to make health insurance selections and maintain coverage that aligns with their needs.	The company was acquired by Alkeme Insurance, via its financial sponsors GCP Capital Partners and Solamere Capital, through an LBO on January 14, 2026 for an undisclosed amount.
Christy Paddock Advisors	Provider of fractional CFO and financial advisory services intended to help growing businesses improve financial reporting, planning, and decision-making. The company engages in offering outsourced financial leadership and advisory services that include management reporting, budgeting and forecasting, mergers and acquisitions guidance, internal control evaluations, and strategic planning, providing business owners and leaders with high-level financial insights and operational support to strengthen performance and guide growth.	The company was acquired by Springline Advisory Holdings, via its financial sponsor Trinity Hunt Partners, through an LBO on January 13, 2026 for an undisclosed amount.

## Financial Services Deals for January 2026

Company Name	Description	Deal Synopsis
GrantExec	Developer of an AI-powered grant discovery and application platform designed to help organizations find and secure funding opportunities. The company offers features for discovering grants, writing applications, connecting with grant professionals, and identifying suitable funders, enabling clients to streamline the funding process and improve access to financial resources.	The company was acquired by Euna Solutions, via its financial sponsors GI Partners and Golub Capital BDC, through an LBO on January 13, 2026 for an undisclosed amount. The acquisition further expands Euna Solutions' grants portfolio by accelerating advanced AI-powered grant research capabilities within the Grants software suite.
S&P Global (EDM and thinkFolio Businesses)	Provider of enterprise data management and investment management platform services intended for global financial institutions, serving asset managers, hedge funds, banks, insurers, and other regulated organizations. The company provides data governance and master data capabilities alongside portfolio management, trading, cash/FX, and compliance workflows through scalable, integrated services.	The EDM and thinkFolio Businesses of S&P Global, was acquired by Gresham via its financial sponsor STG Partners, through an LBO on January 12, 2026.
Sedgwick Claims Management Services	Provider of claims and risk management services based in Memphis, Tennessee. The company offers claims administration and related cost management services in the areas of workers' compensation, short and long-term disability and other employee absence programs and general, automobile and professional liability, thereby meeting the current and future needs of its clients.	Onex's stake in the company was rolled into the continuation fund, Onex Continuation Fund, on January 12, 2026 for an undisclosed amount.
The Bliss Group	Operator of a marketing communications agency intended to help clients drive impact across the healthcare, finance, technology, business and professional services. The company offers marketing strategy, content development, marketing content and media financial services, enabling clients to transform brands into beacons of influence and impact.	The company was acquired by Highwire Public Relations, via its financial sponsor Shamrock Capital Advisors, through an LBO on January 12, 2026 for an undisclosed amount.

## Financial Services Deals for January 2026

Company Name	Description	Deal Synopsis
BEON Retirement	Provider of retirement planning and financial wellness services intended to support individuals preparing for life after work. The company offers tools for income planning, portfolio tracking and long-term savings insights thereby helping users make informed decisions for stable retirement outcomes.	The company was acquired by Navia Benefit Solutions, via its financial sponsor TA Associates Management, through an LBO on January 9, 2026 for an undisclosed amount.
SSC Wealth	Provider of wealth management and financial advisory services intended to serve high-net-worth individuals, business owners, and professionals. The company specializes in asset and income protection, retirement planning, tax-smart wealth management, estate and trust strategies, and charitable giving planning, thereby enabling comprehensive financial guidance and investment oversight tailored to long-term personal and business goals.	The company, a subsidiary of Summers, Spencer & Company was acquired by Merit Financial Advisors, via its financial sponsors Constellation Wealth Capital and NB Capital Solutions, through an LBO on January 9, 2026 for an undisclosed amount.
The Hogan-Knotts Financial Group	Provider of fee-based financial planning services intended for individuals, businesses, and multi-generational families. The company offers financial advice, counseling, coaching, and investment management as well as implements and monitors a client's financial plan, managing investment portfolios and helping clients become stewards of their financial future.	The company was acquired by The Mather Group, via its financial sponsor Vistria Group, through an LBO on January 9, 2026 for an undisclosed amount.
Aimcor Group	Provider of insurance distribution services intended to connect advisors and consumers with financial protection services. The company focuses on advisor support, consumer engagement, and innovation across distribution channels, enabling insurance professionals to deliver financial security and improved customer experiences to individuals and families across diverse demographics.	The company was acquired by Integrity Marketing Group, via its financial sponsors Crescent Capital Group, GIC Private, Harvest Partners, HGGC, Silver Lake, and The Carlyle Group, through an LBO on January 8, 2026 for an undisclosed amount.



## Financial Services Deals for January 2026

Company Name	Description	Deal Synopsis
JGH Consulting	Provider of mergers and acquisitions advisory services designed to guide business owners through growth planning and strategic exit decisions. The company offers transaction expertise, financial advisory services, and a hands-on deal process, enabling small to mid-sized business owners to make informed choices and maximize long-term enterprise value.	The company was acquired by Nichols Cauley, via its financial sponsor Madison Dearborn Partners, through an LBO on January 7, 2026 for an undisclosed amount.
Remedy Payment Solutions	Provider of merchant payment processing and financial transaction services, serving small to mid sized businesses in the moving, storage, and logistics sectors. The company provides credit and debit card processing for card-present and card-not-present transactions, mobile and virtual terminals, recurring and automated billing, and software platform integrations, as well as chargeback monitoring, PCI compliance support, and next-day funding, all delivered through a consultative, solution-based model that emphasizes transparent pricing, personalized service, and industry-specific payment workflows.	The company was acquired by SmartMoving, via its financial sponsors Mainsail Partners and Nash Technology Group , through an LBO on January 7, 2026 for an undisclosed amount.
Anchor Health Capital	Operator of investment management services focused on the disciplined deployment of capital across a range of healthcare property types. The company combines fund management with development, acquisition, and operational capabilities to create a vertically integrated platform serving healthcare providers and investors nationwide, enabling the firms to execute seamlessly across financing, development, asset management, and property operations.	The company was acquired by Anchor Health Properties, via its financial sponsor StepStone Group, through an LBO on January 5, 2026 for an undisclosed amount.
Austin Private Wealth	Provider of investment and wealth management services to high-net-worth individuals, businesses, and nonprofit organizations. The company offers financial planning, risk management, gift planning, wealth accumulation, and defined benefit plans advisory, enabling clients to receive customized financial advice after a comprehensive review of existing investments and the development and implementation of an investment plan.	The company was acquired by Cerity Partners, via its financial sponsors Harvest Partners and Genstar Capital, through an LBO on January 6, 2026 for an undisclosed amount.

## Financial Services Deals for January 2026

Company Name	Description	Deal Synopsis
First Texas Agency	Provider of personal and commercial insurance products and services intended for safeguarding assets and managing risks. The company offers homeowners' insurance, auto insurance, workers' compensation, life insurance, health insurance, general liability, specialized policies, and claims assistance, ensuring protection tailored to the insurance needs of clients' circumstances.	The company was acquired by Trucordia, via its financial sponsors Blue Owl Capital, Blue Owl Capital BDC, HGGC, Crescent Capital Group and The Carlyle Group, through an LBO on January 6, 2026 for an undisclosed amount.
Quarterra	Operator of a multifamily housing platform intended to create attainable, well-built residential communities that deliver long-term value for residents and partners. The company offers integrated development expertise, production-build capabilities, and in-house investment and asset management, enabling residents, investors, and community stakeholders to benefit from high-quality homes, disciplined execution, and sustainable community growth.	The company was acquired by TPG through an LBO on January 6, 2026 for an undisclosed amount. The company was recapitalized through this transaction. As part of the acquisition, TPG has made an additional \$1 billion strategic commitment and expects to raise further capital to grow Quarterra's development pipeline, with a focus on its Emblem attainable housing brand.
Atlantic Group	Provider of risk advisory services intended to mitigate uncertainty in respect of an identified risk. The company provides risk management services throughout the investment lifecycle, providing a range of services and products including representations and warranties insurance, tax liability insurance and insurance due diligence, enabling insurers to obtain the best cover from the insurance market.	The company was acquired by Howden Group Holdings, via its financial sponsors La Caisse, General Atlantic and Hg, through an LBO on January 5, 2026 for an undisclosed amount.
Legacy Bank and Trust	Provider of banking services catering to financial leaders in economic and community development with financial products and services that benefit largely underserved populations. The company offers a wide range of services, including deposit accounts, lending services, online banking and financial planning tools, enabling clients to efficiently manage their finances and access credit.	The company was acquired by Southern Bancorp, via its financial sponsors Bank of America, JP Morgan Chase and Triodos Investment Management, through an LBO on January 5, 2026 for an undisclosed amount. The acquisition expands Southern Bancorp's footprint and expand its asset size to nearly \$5 billion.

## Financial Services Deals for January 2026

Company Name	Description	Deal Synopsis
SunAmerica Asset Management	Provider of investment management services catering to the needs of institutional clients and pooled investment vehicles. The company specializes in advisory, portfolio management, and financial planning, thereby distributing its reach through a multi-channel network.	The company, a subsidiary of Corebridge Financial, was acquired by Venerable, via its financial sponsors Apollo Global Management and Reverence Capital Partners, through an LBO on January 5, 2026 for an undisclosed amount.
Olympus Insurance Company	Provider of residential property insurance services intended for protecting owner-occupied homes, condominiums, and rental properties against structural, weather, and liability risks. The company offers underwriting, policy administration, claims management, and optional coverage enhancements, enabling homeowners and residential property owners to manage financial exposure and safeguard property value in catastrophe-prone markets.	The company was acquired by SageSure Insurance Managers, via its financial sponsor Flexpoint Ford, through an LBO on January 2, 2026 for an undisclosed amount.
Bilz Insurance Agency	Operator of an insurance advisory practice intended to protect personal and commercial assets through tailored coverage selection. The company offers comprehensive policy comparison, claims advocacy, and relationship-driven risk assessment, enabling individuals, families, and business owners to secure appropriate coverage with confidence and long-term assurance.	The company was acquired by King Risk Partners, via its financial sponsors Lightyear Capital and BHMS Investments, through an LBO in approximately January 2026 for an undisclosed amount.
Burgau Insurance	Provider of insurance brokerage and risk management services intended to help individuals and businesses secure tailored insurance services. The company offers personalized policy placement, claims advocacy, risk assessments, and coverage reviews across multiple lines of insurance, enabling clients to protect assets and manage financial risk with confidence.	The company was acquired by Keystone Agency Partners, via its financial sponsors Warburg Pincus and Bain Capital Credit, through an LBO in approximately January 2026 for an undisclosed amount.

## Financial Services Deals for January 2026

Company Name	Description	Deal Synopsis
Construction Underwriters	Provider of surety bond and commercial bond services intended to serve the construction and contractor industries. The company offers contract bid bond issuance, performance and payment bond facilitation, commercial licence and permit bond placement, court and financial guarantee bond support, and subdivision bond coordination, thereby helping clients with meeting bonding requirements for construction projects and regulatory obligations.	The company was acquired by Choice Insurance Agency, via its financial sponsor Northlane Capital Partners, through an LBO in approximately January 2026 for an undisclosed amount.
Griffith, Ballard & Company	Provider of life insurance products and sales services based in Cedar Rapids, Iowa. The company supports the development, illustration, valuation, and regulatory compliance of life and annuity products, serving life insurers and fraternal benefit societies across the United States.	The company was acquired by Lewis & Ellis, via its financial sponsor Novacap, through an LBO on January 1, 2026 for an undisclosed amount.
Litman Gregory Wealth Management	Provider of wealth management services intended to cater to individuals, family groups, non-profit organizations, and institutions. The company provides financial planning, tax planning strategies, estate and legacy plans, risk management, and personal wealth management services, thereby enabling clients to improve their financial well-being.	The company, a subsidiary of iM Global Partner, was acquired by Beacon Pointe Advisors and Kohlberg Kravis Roberts through an LBO on January 1, 2026 for an undisclosed amount.
The Hilb Group (Property and Casualty Agency in Pennsylvania)	Provider of insurance brokerage services intended to deliver property and casualty coverage for clients. The company offers risk management, policy placement, and client advisory services, enabling businesses and individuals to access tailored insurance programs and protect against financial loss.	The company was acquired by The Hilb Group, via its financial sponsor The Carlyle Group, through an LBO on January 1, 2026 for an undisclosed amount.

## Financial Services Deals for January 2026

Company Name	Description	Deal Synopsis
Witkin Scott Associates	Provider of property and casualty insurance services intended for personal and business clients. The agency offers auto, home, commercial property, and workers' compensation insurance, thereby representing and helping multiple insurance carriers.	The company was acquired by Lawley Insurance, via its financial sponsor Pritzker Private Capital, through an LBO on January 1, 2026 for an undisclosed amount. As a result of this partnership, Witkin Scott Associates will benefit from expanded access to Lawley's sophisticated resources and market opportunities, while preserving its established local presence and the client relationships it has cultivated.