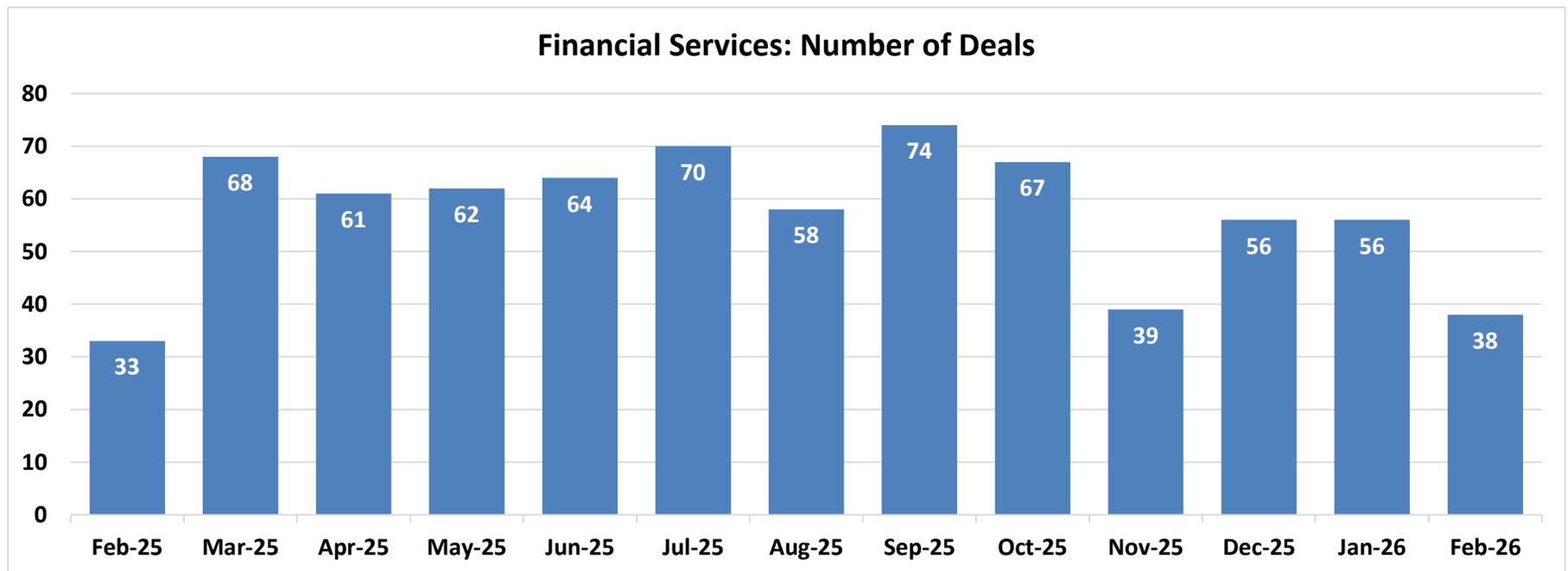


Financial Services Deals for February 2026

There were 38 completed U.S. private equity deals in the Financial Services sector during the month of February. The number of deal transactions were down approximately 32% from January. There was a 15% increase in the number of Financial Services deals compared to February 2025.



Financial Services Deals for February 2026

| Company Name | Description | Deal Synopsis |
|--|--|--|
| TFB Advisors (Book of Business of an Advisor Team) | Provider of holistic wealth-building services catering to high-net-worth individuals, business owners, hospitals and hospital systems, and dental practices in the United States. The business division offers holistic wealth-building services, including financial planning, investment management, retirement income planning, and estate preservation, thereby enabling its clients to access tax strategies and estate planning, as well as diversified investment options that leverage national resources. | The business division of TFB Advisors, was acquired by Wealth Enhancement Group, via its financial sponsors Primark Capital, TA Associates Management and Onex, through an LBO on February 27, 2026 for an undisclosed amount. |
| Wealth Planning | Provider of financial planning and investment management services to individual investors and families. The company uses a proprietary Money Coaching System to integrate financial, investment, and estate planning in an unbiased, commission-free advisory model to help clients work toward long-term financial stability. | The company was acquired by MCF Advisors, via its financial sponsor HGGC, through an LBO on February 27, 2026 for an undisclosed amount. |
| Eventus | Developer of global trade surveillance and market risk platform intended to offer safer financial services for high-value securities trading. The company's platform leverages artificial intelligence to reduce false positives and generate actionable alerts across equities, equity options, futures, foreign exchange, fixed income, and digital assets, enabling clients to solve some of their pressing regulatory challenges. | The company was acquired by Terminus Capital Partners through an LBO on February 26, 2026 for an undisclosed amount. |
| Lewis Insurance (Multi-line Insurance) | Provider of insurance services intended to cover individuals, families, and businesses. The company offers home, auto, renters, commercial, life, and health policies, enabling clients to protect property and manage financial risk. | The company was acquired by King Risk Partners, via its financial sponsors BHMS Investments and Lightyear Capital, through an LBO on February 26, 2026 for an undisclosed amount. |

Financial Services Deals for February 2026

| Company Name | Description | Deal Synopsis |
|------------------------------------|--|---|
| Medivest | Provider of Medicare secondary payer (MSP) compliance services intended for law firms, workers' compensation payers, special needs trusts, brokers, and other parties. The company offers lien resolution, professional administration, custodial accounts, trust advisory services, compliance consulting, and settlement planning, enabling law firms and insurers to meet regulatory requirements and reduce settlement risk. | The company was acquired by Physician Life Care Planning, via its financial sponsor WestView Capital Partners, through an LBO on February 26, 2026 for an undisclosed amount. |
| Monarch Solutions | Provider of insurance and wealth protection and strategic financial planning services intended for high net worth individuals, business owners, and corporate clientele. The company offers Medicare supplement, life and long-term care insurance planning, policy audits, wealth transfer strategies, premium finance, and personalized plans, enabling clients to protect their wealth, reduce financial risk, and support long-term estate and retirement goals. | The company was acquired by Higginbotham, via its financial sponsors Blackstone, Stone Point Capital, The Carlyle Group and Ares Management, through an LBO on February 26, 2026 for an undisclosed amount. |
| Sanford Insurance (Macon) | Provider of insurance services intended to serve individuals, employers, and businesses. The company offers personal insurance, commercial insurance, employee benefits administration, and third-party claims administration services, thereby helping clients manage risk, secure appropriate coverage, and maintain financial protection. | The company was acquired by Aria Care Partners, via its financial sponsor Serent Capital, through an LBO on February 26, 2026 for an undisclosed amount. |
| Silicon Valley Retirement Services | Provider of retirement and financial advisory services intended to meet the diverse needs of plan sponsors and participants. The company offers customized fiduciary and advisory services, an institutional investment program, plan administration and consulting, and personalized participant services, thereby enabling retirement and financial planning advice for customers. | The company was acquired by OneDigital, via its financial sponsors CPP Investments, Onex and Stone Point Capital, through an LBO on February 26, 2026 for an undisclosed amount. |

Financial Services Deals for February 2026

| Company Name | Description | Deal Synopsis |
|-------------------------------------|---|--|
| Thompson Wealth Management | Provider of independent financial advisory services intended for serving federal employees. The company's services include investment management, financial planning, tax strategies, estate planning, and retirement aid, enabling clients with a tailored and personalized approach, ensuring every strategy aligns with their financial objectives and risk tolerance. | The company was acquired by EP Wealth Advisors, via its financial sponsor Berkshire Partners, through an LBO on February 26, 2026 for an undisclosed amount. |
| Waxman Associates | Provider of outsourced accounting, financial consulting, and advisory services catering to small and medium-sized enterprises with strategic reporting, compliance, and operational finance functions. The company offers a range of services, including financial analysis, accounting, cash flow management, tax compliance support, strategy and advisory, and other industry-specific consulting for sectors such as construction, not-for-profit, professional services, and technology, providing business owners and executives with reliable financial management, insights, and operational support that enhance decision-making and organisational performance. | The company was acquired by Consero Global Solutions, via its financial sponsor BV Investment Partners, through an LBO on February 25, 2026 for an undisclosed amount. The acquisition will provide clients with enhanced capabilities across financial operations, reporting, planning, and advisory tailored to the unique regulatory, operational, and portfolio requirements of extended care real estate and facility management. |
| Derse Morgen Financial Advisors | Provider of financial planning and investment advisory services intended to serve individuals and families. The company offers comprehensive financial planning, investment planning, wealth management, and retirement planning, thereby enabling clients to make informed financial decisions and prepare for long-term financial objectives. | The company was acquired by OneDigital, via its financial sponsors Stone Point Capital, Onex and CPP Investments, through an LBO on February 24, 2026 for an undisclosed amount. |
| Sacksteder Worland Insurance Agency | Operator of an independent insurance agency based in Tiffin, Ohio. The company offers personalized risk guidance, access to multiple reputable carriers, and a broad portfolio of personal and commercial insurance products, enabling policyholders across diverse communities to secure reliable protection with trusted advisory support. | The company, subsidiary of Myers & Smith Insurance was acquired by WalkerHughes Insurance, via its financial sponsor BW Forsyth Partners, through an LBO on February 24, 2026 for an undisclosed amount. |

Financial Services Deals for February 2026

| Company Name | Description | Deal Synopsis |
|------------------------|---|--|
| CashLine Solutions | Provider of cash flow management services for businesses across North America. The company offers credit management, collections, dispute resolution, accounts receivable risk analysis, and end-to-end order-to-cash process support using proprietary software, thereby helping organizations reduce payment delays and improve financial performance. | The company was acquired by Western Trail Capital through an LBO on February 23, 2026 for an undisclosed amount. |
| Gallatin Point Capital | Provider of opportunistic investment management services focused on financial institutions, services, and assets. The company applies a flexible and collaborative investment approach and uses its financial industry experience and global relationships to support the growth of its portfolio companies. | The company was acquired by Capital Constellation, via its financial sponsors Wafra, AP Fonden 3, Alaska Permanent Fund, Railpen, Public Institute for Social Security and Kuwait Investment Authority, through an LBO on February 23, 2026 for an undisclosed amount. |
| Lumen Select | Provider of specialized insurance services intended to offer tailored coverage for personal lines risks. The company offers a range of policies, including home, auto, and specialty personal insurance, with flexible terms, digital policy management, and responsive claims support, enabling consumers and independent agents to access personalized insurance protection efficiently and reliably. | The company was acquired by Vistria Group through an LBO on February 23, 2026 for an undisclosed amount. |
| PINE Advisor Solutions | Provider of regulatory compliance, fund administration, and distribution support services designed to enable asset managers to navigate investment fund regulatory environments. The company's services include outsourcing Chief Financial Officers, regulatory compliance oversight, fund officer roles, transfer agency support, and distribution management for registered funds, evergreen structures, and private funds, providing investment managers with specialised operational support and governance expertise that enhances regulatory adherence and fund administration efficiency. | The company was acquired by Centralis Group, via its financial sponsor HGGC, through an LBO on February 18, 2026 for an undisclosed amount. |

Financial Services Deals for February 2026

| Company Name | Description | Deal Synopsis |
|--|---|--|
| Venn by Two Sigma | Developer of an investment analytics platform designed to deliver multi-asset capabilities in portfolio analytics. The company's platform helps asset owners, asset managers, and advisors embrace a quantitative approach to multi-asset portfolio risk and investment decision making, breaks down manager risk and return and identify those that support the performance goals, enabling users to get a quantitative approach to multi-asset portfolio risk and investment decision making. | The company a subsidiary of Two Sigma Investments was acquired by Solovis, via its financial sponsor Insight Partners, through an LBO on February 18, 2026 for an undisclosed amount. |
| CMJ | Operator of a certified public accounting (CPA) company committed to helping the North Country's businesses and their owners succeed. The company offers a broad range of audit, financial planning, accounting, tax, and business advisory services, enabling its diverse client base with expertise in domestic, multi-state, and international matters to get support for their continued business growth. | The company was acquired by UHY, via its financial sponsor Summit Partners, through an LBO on February 17, 2026 for an undisclosed amount. The acquisition enhances UHY's presence in New York State and adds the company's deep industry expertise in construction and financial services to its growing national platform. |
| Ten Eyck Group | Provider of comprehensive insurance advisory services designed to safeguard personal and commercial assets. The company offers multi-line coverage across business, home, auto, life, health, group benefits, and bond insurance through established carrier partnerships, enabling individuals and enterprises across New York to secure tailored protection with competitive pricing and dedicated client service. | The company was acquired by King Risk Partners, via its financial sponsors BHMS Investments and Lightyear Capital, through an LBO on February 17, 2026 for an undisclosed amount. |
| LOC Investment Advisers (Asset Management) | Provider of investment advisory services focused on wealth management and financial planning. The company offers portfolio management and retirement planning solutions, enabling clients to organize and grow their financial assets. | The company was acquired by MAI Capital Management through an LBO on February 13, 2026 for an undisclosed amount. |

Financial Services Deals for February 2026

| Company Name | Description | Deal Synopsis |
|---|--|--|
| Ace Insurance | Provider of personal and commercial insurance brokerage services intended to deliver a comprehensive range of coverage options for individuals and businesses in Georgia and neighboring states. The company's insurance services include auto, homeowners, life, health, and business insurance products through multiple carrier representation and dedicated client teams, enabling clients to secure tailored insurance coverage that addresses their specific risk needs. | The company was acquired by King Risk Partners, via its financial sponsors Lightyear Capital and BHMS Investments, through an LBO on February 12, 2026 for an undisclosed amount. |
| Laredo Commercial Insurance Agency (For-Hire Trucking portfolio in Laredo, Texas) | A portfolio of for-hire trucking insurance accounts based in Laredo, Texas. | The For-Hire Trucking portfolio in Laredo, Texas was acquired by Alliant Insurance Services, via its financial sponsors Stone Point Capital and Public Sector Pension Investment Board, through an LBO on February 12, 2026 for an undisclosed amount. |
| LeSourd Partners | Provider of relationship-based support services intended for financial professionals in the financial services market. The company focuses on assisting advisors through personalized guidance and operational support, thereby helping them manage and grow their practices effectively. | The company was acquired by Simplicity Financial Marketing Holdings, via its financial sponsors SkyKnight Capital and Dragoneer Investment Group, through an LBO on February 12, 2026 for an undisclosed amount. |
| Scarbrough, Medlin & Associates | Provider of insurance services intended for commercial property clients. The company specializes in commercial property insurance, supporting property management firms, association management companies, and multifamily and mixed-use developments, and also serves other complex commercial classes, including large school districts, electric cooperatives, oil and gas operations, contractors, and restaurants and bars. | The company was acquired by Inszone Insurance Services, via its financial sponsors Ares Capital Corporation BDC, BHMS Investments, Lightyear Capital and Ares Management, through an LBO on February 12, 2026 for an undisclosed amount. |
| Shinto Landscaping | Provider of landscape management services intended to serve commercial property owners. The company offers weed control, pest management, arbor care, and maintenance services for irrigation, turf, plants, and trees, as well as invests in landscape management companies in Florida's commercial real estate market, thereby enabling clients to maintain their grounds and properties. | The company was acquired by LMC Landscape Partners, via its financial sponsor Trivest Partners, through an LBO on February 12, 2026 for an undisclosed amount. |

Financial Services Deals for February 2026

| Company Name | Description | Deal Synopsis |
|--|---|--|
| Ferghana Investment Partners | Provider of flexible capital services intended for middle-market businesses. The company is a hybrid capital firm that delivers tailored capital services at the intersection of credit and structured equity and bridges gaps in conventional financing, emphasize downside protection and maintain alignment between owners and investors. | The company was acquired by New Catalyst Strategic Partners, via its financial sponsor Apollo Global Management, through an LBO on February 10, 2026 for an undisclosed amount. |
| RightPath Investments & Financial Planning | Provider of investment advisory services intended to improve long-term financial well-being of individuals. The company offers personalized wealth management plans, advice and guidance based on clients' risk tolerance, timeline, needs, and goals, thereby enabling the clients to make informed financial decisions. | The company was acquired by Mission Wealth, via its financial sponsor Great Hill Partners, through an LBO on February 10, 2026 for an undisclosed amount. |
| Wholehan Marketing | Provider of consultative insurance marketing services intended to support financial advisors nationwide. The company offers a consultative approach to case design, product selection, underwriting and suitability guidance across life insurance, annuity brokerage, long term care and advanced market support, disability insurance, and related insurance lines, enabling financial advisor markets to enhance client outcomes, expand service capabilities, and grow their practices efficiently. | The company was acquired by Simplicity Financial Marketing Holdings, via its financial sponsors SkyKnight Capital and Dragoneer Investment Group, through an LBO on February 10, 2026 for an undisclosed amount. |
| Triad Oilfield Underwriters | Provider of upstream energy insurance services, specializing in underwriting for oilfield operations. The company delivers Lloyd's coverholder authority, in-house underwriting expertise, and fast decision-making supported by nearly 200 years of combined industry experience, enabling clients to secure tailored coverage and manage risk effectively. | The company was acquired by Revau, via its financial sponsor Novacap, through an LBO on February 06, 2026 for an undisclosed amount. |

Financial Services Deals for February 2026

| Company Name | Description | Deal Synopsis |
|------------------------------|---|---|
| Altum Digital Infrastructure | Operator of data center facilities intended to serve enterprise and co-location users in the United States. The company specializes in owning and operating operational data centers, managing co-location and enterprise facilities, expanding capacity, extending leases, and onboarding tenants, thereby enabling clients with mission-critical infrastructure and predictable operating environments. | The company was acquired by Igneo Infrastructure Partners through an LBO on February 5, 2026 for an undisclosed amount. The transaction was supported by debt financing. |
| Midtown Advisors | Provider of financial advisory and merchant banking services for private business owners and investors. The company offers sell side and buy side advisory, capital raising, and strategic guidance through a structured process to support ownership transitions and long term value creation. | The company, a subsidiary of Independent Advisor Alliance, was acquired by Osaic via its financial sponsors Reverence Capital Partners and ACE & Company, through an LBO on February 5, 2026. |
| Pronto Insurance | Provider of automobile insurance services intended to serve drivers seeking state-required and liability-based coverage across its operating regions. The company specializes in underwriting and distributing auto coverage policies, including liability insurance, SR-22 filings, roadside assistance programs, and Mexico auto insurance, thereby providing individual drivers with access to legally compliant vehicle coverage and related protection services. | The company, a subsidiary of Arthur J. Gallagher & Company, was acquired by Fiesta Insurance, via its financial sponsors CD Private Equity, BharCap Partners and Fenway Summer, through an LBO on February 5, 2026 for an undisclosed amount. |
| Foris Solutions | Operator of home service businesses intended to acquire and grow companies that deliver reliable support to consumers in and around their households. The company offers experienced leadership, proven operational practices, and a focus on employee development, enabling residential customers to access dependable services, while employees benefit from meaningful career opportunities. | The company was acquired by Precision Garage Door Service, via its financial sponsors Monogram Capital Partners and SBJ Capital, through an LBO on February 3, 2026 for an undisclosed amount. |

Financial Services Deals for February 2026

| Company Name | Description | Deal Synopsis |
|------------------------|---|---|
| GFP Private Wealth | Provider of conflict-free investment and wealth management counsel services intended to offer fee-based registered investment services. The company's conflict-free investment and wealth management counsel services include family office facilities, investment advisory, and asset under management, thereby enabling high net worth and institutional audiences to avail themselves of a range of investment services. | The company, a subsidiary of The 4100 Group, was acquired by Arax Investment Partners via its financial sponsor RedBird Capital Partners, through an LBO on February 3, 2026 for an undisclosed amount. |
| Premier Private Wealth | Provider of personalized wealth management services intended for individuals seeking tailored financial planning. The company conducts detailed client discovery, creates customized financial plans, implements coordinated strategies with financial professionals, and maintains ongoing portfolio oversight to align with long-term goals. | The company was acquired by Summit Wealth Group, via its financial sponsor Constellation Wealth Capital, through an LBO on February 3, 2026 for an undisclosed amount. |
| Rovin Capital | Provider of investment advisor services intended to provide fiduciary wealth management, financial planning, and alternative investment solutions. The company services span retirement planning, investment management, asset protection, executive benefits, banking and credit advisory, business succession planning, corporate retirement plans, and estate and foundation planning, aiming to support portfolio company growth while delivering alternative return streams for investors. | The company was acquired by CW Advisors through an LBO on February 3, 2026 for an undisclosed amount. |
| Source Brokerage | Provider of disability income insurance support services intended to assist brokers in delivering tailored protection. The company offers access to major carriers, expert DI specialists, educational tools, a combination of wealth accumulation and financial protection products, and comprehensive case administration, enabling insurance brokers across the United States to enhance client guidance and build stronger, more reliable disability insurance revenue streams. | The company was acquired by Simplicity Financial Marketing Holdings, via its financial sponsors SkyKnight Capital and Dragoneer Investment Group, through an LBO on February 2, 2026 for an undisclosed amount. |

Financial Services Deals for February 2026

| Company Name | Description | Deal Synopsis |
|---------------------|---|--|
| Mt. Pleasant Agency | Provider of insurance brokerage services intended to serve families and businesses in Central Michigan. The company provides auto, home, annuity, long-term care, and umbrella insurance in personal space and business liability, commercial auto, and property insurance to business clients, thereby providing insurance protection and risk management services to clients. | The company was acquired by Highstreet Insurance Partners, via its financial sponsor Ares Management, Ares Capital Corporation BDC and Abry Partners, through an LBO in approximately February 2026 for an undisclosed amount. |