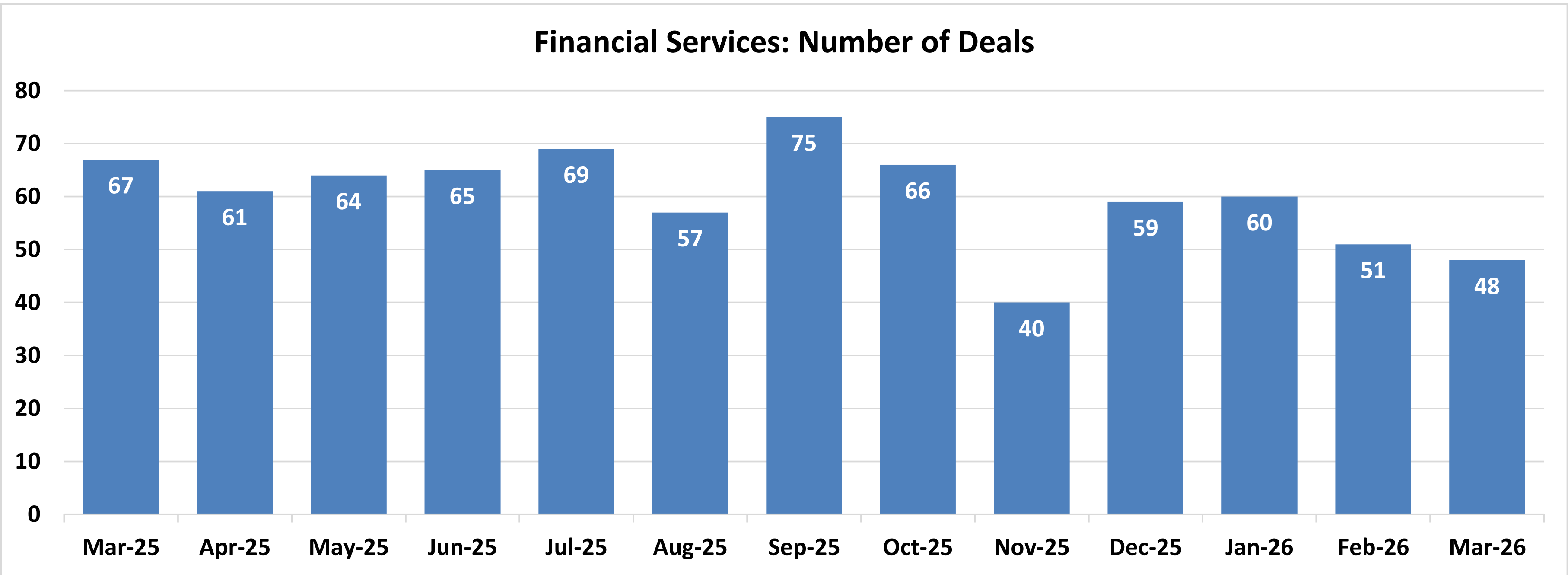
Financial Services Deals for March 2026

There were 48 completed U.S. private equity deals in the Financial Services sector during the month of March. The number of deal transactions were down approximately 6% from February. There was a 28% decrease in the number of Financial Services deals compared to March 2025.



Financial Services Deals for March 2026

Company Name	Description	Deal Synopsis
Charter Oak Capital Management	Provider of wealth management advisory services based in Portland, Maine. The company's services include comprehensive investment management, retirement planning, portfolio review, real-estate planning, pension plans and other financial planning that are tailored to clients' needs, enabling customers with a personalized plan for their goals and investments.	The company, a subsidiary of MetLife, was acquired by Mercer Global Advisors via its financial sponsors Altas Partners, Genstar Capital, Harvest Partners, NB Capital Solutions, and Oak Hill Capital, through an LBO on March 31, 2026.
Divergent Planning	Provider of financial planning and investment management services intended to support individuals and professionals in managing complex financial needs. The company offers fee-based financial planning, investment management, retirement planning, wealth management, and advisory services, enabling clients to achieve financial clarity, cohesion, and long-term confidence.	The company was acquired by EP Wealth Advisors, via its financial sponsors Berkshire Partners and Ares Management, through an LBO on March 31, 2026 for an undisclosed amount.
Exencial Wealth Advisors	Provider of wealth management services intended to help clients in their quest for financial security. The company offers investment management, cash flow and debt management, tax planning and executive compensation and planning among others, allowing clients to make critical financial decisions and grow their wealth.	The company was acquired by Savant Wealth Management, via its financial sponsors Cynosure Partners, Kelso & Company and Kingsway Financial Services, through an LBO on March 31, 2026 for an undisclosed amount.
Heller Wealth Management	Provider of financial planning and investment advisory services intended to serve individuals, families, and business owners in the United States. The company specializes in personalized investment advice, holistic financial planning, and coordination of clients' financial lives while operating as an independent registered investment advisor with a fiduciary obligation and transparent advisor fees, thereby supporting informed financial decision-making and long-term financial confidence.	The company was acquired by Savant Wealth Management, via its financial sponsors Vlasic Group, Cynosure Partners, Kelso & Company and Kingsway Financial Services. through an LBO on March 31, 2026 for an undisclosed amount.

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Company Name	Description	Deal Synopsis
Matkovic Financial Group	Provider of financial advisory and wealth management services designed to support financial stability and long-term wealth growth. The company offers personalized investment management, tax planning, retirement and estate planning, insurance guidance, and business consulting services, enabling individuals, families, and small businesses to manage finances effectively and plan for future financial goals.	The company was acquired by Cetera Financial Group, via its financial sponsor Genstar Capital, through an LBO on March 31, 2026 for an undisclosed amount.
Onstad's Insurance Agency	Provider of independent insurance brokerage services intended to offer comprehensive coverage for individuals and businesses. The company offers policy comparison, risk assessment, and tailored insurance packages, enabling clients to secure competitive rates for auto, home, and commercial protection through a personalized research process.	The company was acquired by Inszone Insurance Services, via its financial sponsors Ares Capital Corporation BDC, BHMS Investments, Ares Management and Lightyear Capital, through an LBO on March 31, 2026 for an undisclosed amount.
Parros Financial Group	Provider of financial advisory and wealth management services intended for comprehensive personal and institutional financial planning. The company integrates investment management, retirement strategies, tax-efficient planning, and insurance solutions, enabling clients to achieve long-term financial security and optimized wealth outcomes.	The company was acquired by Wealth Enhancement Group, via its financial sponsors Onex, TA Associates Management, and Primark Capital, through an LBO on March 31, 2026 for an undisclosed amount.
Pursuit Wealth Management	Provider of wealth management services intended to help individuals achieve financial goals. The company offers personalized financial planning, estate planning, and retirement planning, enabling clients to gain clarity and pursue long-term financial objectives with confidence.	The company was acquired by Cary Street Partners, via its financial sponsor CIVC Partners, through an LBO on March 31, 2026 for an undisclosed amount. The expansion reflects Cary Street Partners' broader national growth plan, which emphasizes aligning with local teams deeply rooted in communities.

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Company Name	Description	Deal Synopsis
RVA Wealth Management	Provider of financial planning services intended to help individuals achieve long-term retirement goals. The company operates as an independent fiduciary and utilizes a collaborative planning process, providing investment management and wealth preservation services to enable clients to safeguard assets and maintain their lifestyle.	The company was acquired by RFG Advisory, via its financial sponsor Long Ridge Equity Partners, through an LBO on March 31, 2026 for an undisclosed amount.
Uphold Worldwide	Developer of a financial trading platform designed to make cryptocurrencies and other assets affordable and accessible for everyone. The company's platform covers cryptos and utility tokens, major national currencies, stablecoins, and precious metals, enabling consumers and businesses to easily transact between digital and traditional currencies with full integration between old and new money systems.	The company was acquired by C1 Fund through an LBO on March 31, 2026 for an undisclosed amount.
Andesa	Provider of software-as-a-service offerings intended for top and mid-tier life and annuity carriers, as well as distributors and brokers. The company offers a comprehensive suite of integrated policy administration, plan administration and illustration solutions for life insurance and annuity carriers and brokers, enabling clients to specialize in providing solutions that streamline workflows, improve speed-to-market and reduce infrastructure costs.	The company was acquired by Terminus Capital Partners through an LBO on March 26, 2026 for an undisclosed amount.
GulfTex Energy VI	Operator of energy investment and asset management activities focused on the oil and gas sector based in San Antonio, United States. The company manages capital deployment, oversight of upstream assets, and partnership structures with an emphasis on portfolio monitoring and operational governance, thereby supporting disciplined energy asset ownership.	The company received $1 billion of development capital from GulfTex Energy, PGIM Real Estate, Endurance Investment Partners and other minority investors on March 24, 2026. As a result of the transaction, the company was recapitalized.

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Company Name	Description	Deal Synopsis
Schuessler Insurance & Real Estate	Operator of an insurance coverage firm and real estate agency catering to personal and commercial clients in Alva, Oklahoma. The company offers farm, agricultural, and small-business coverage services and rents real estate, thereby helping its clients protect their assets.	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 March 24, 2026 for an undisclosed amount.
Chinook Insurance Group	Operator of a commercial insurance brokerage firm serving subsea aquaculture and other specialized industries. The company delivers industry-specific insurance products across directors' and officers liability, employment practices liability, professional liability, cyber, and kidnap and ransom by combining market knowledge, technology-enabled processes, and long-standing underwriting relationships to meet the needs of aquatic industry clients and investors.	The company was acquired by Relation Insurance, via its financial sponsor Aquiline, through an LBO on March 23, 2026 for an undisclosed amount.
Threadline Wealth	Provider of wealth management and investment advisory services intended for high-net-worth individuals, business owners, and executives with complex financial needs. The company integrates investment management, tax planning coordination, estate planning support, and collaboration with accounting professionals, enabling affluent clients and families to achieve clarity, alignment, and informed decision-making across their financial lives.	The company was acquired by Cynosure Partners and its management through an LBO on March 20, 2026 for an undisclosed amount.
Leap AI (Menlo Park)	Provider of artificial intelligence-driven healthcare services intended for healthcare innovation. The company offers workflow automation and research and development services, thereby improving clinical outcomes, accelerating impact, and enhancing patient care.	The company was acquired by The Chartis Group, via its financial sponsor Blackstone, through an LBO on March 19, 2026 for an undisclosed amount.

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Company Name	Description	Deal Synopsis
Streeter Brothers Insurance	Provider of personal, commercial, and life insurance products to individuals and businesses in Billings, Montana. The company offers auto, home, life, health, and business insurance, thereby enabling clients to have access to coverage options through various insurance carriers to meet diverse needs.	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 March 19, 2026 for an undisclosed amount.
Ohio Valley Insurance	Provider of insurance brokerage services serving agricultural, personal, and business clients. The company combines farming and insurance experience to offer crop insurance alongside property and casualty, life, and health coverage, while enabling agents to meet clients in person to assess operations and recommend appropriate policies.	The company was acquired by Inszone Insurance Services, via its financial sponsors BHMS Investments, Ares Management, Lightyear Capital and Ares Capital Corporation BDC, through an LBO on March 17, 2026 for an undisclosed amount. The addition strengthens Inszone Insurance Services' continued expansion into the agricultural and crop insurance sector.
Petroleum Processing Solutions	Provider of payment processing systems intended to enable secure fuel and retail transaction management. The company's systems include compliant pay-at-the-pump processing, integrated payment gateways, and specialized hardware tailored for fuel stations and multi-lane retail environments, enabling independent fuel merchants, convenience retailers, and partner institutions to process transactions and manage payments across complex retail operations.	The company, a subsidiary of Data Processing Solutions, was acquired by Celero Commerce, via its financial sponsors LLR Partners and EQ Holdings, through an LBO on March 17, 2026 for an undisclosed amount.
Chichester Financial Group	Provider of independent financial consulting services specializing in personal wealth management and 401k advising for individuals, families and business owners. The company conducts detailed assessments, develops tailored financial plans, manages retirement plan structures and oversees fiduciary responsibilities to help clients achieve long-term financial clarity.	The company was acquired by Maridea Wealth Management, via its financial sponsors 119th Street Capital and Pelican Capital, through an LBO on March 16, 2026 for an undisclosed amount.

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Company Name	Description	Deal Synopsis
McBride Financial Advisors	Provider of financial planning and registered investment advisory services based in Seahurst, Washington. The company and the firm operate under a fiduciary standard and offer personalized wealth management covering investment advice, estate and trust planning, insurance review, tax planning, asset protection, and philanthropic planning with a long-term investment approach aligned to client goals.	The company was acquired by Waverly Advisors, via its financial sponsor HGGC and Ares Management, through an LBO on March 13, 2026 for an undisclosed amount. The acquisition strengthens Waverly's presence in the Pacific Northwest and underscores its disciplined M&A approach, rooted in cultural alignment.
Century Finance Incorporated (Receivables Portfolio of Customers in United States)	A portfolio of receivables of consumer loans and credit accounts of the customers based in the United States.	The receivables portfolio of Century Finance Incorporated was acquired by Lendmark Financial Services, via its financial sponsors Ontario Teachers' Pension Plan and Lightyear Capital, through an LBO on March 12, 2026 for an undisclosed amount.
Charles James Cayias Insurance	Provider of personal and commercial insurance services, specializing in liability, auto, health, life, and industry-specific coverage. The company offers tailored insurance programs for businesses and individuals, enabling clients to protect assets, manage risk, and ensure long-term financial security.	The company was acquired by Inszone Insurance Services, via its financial sponsors Ares Capital Corporation BDC, Lightyear Capital, BHMS Investments and Ares Management, through an LBO on March 12, 2026 for an undisclosed amount.
Duncan & Haley	Provider of wealth management and financial advisory services intended to help individuals, families, and institutions plan, manage, and preserve financial assets. The company offers financial planning, investment advisory, retirement planning, insurance consulting, and portfolio analysis services, enabling individual investors and institutional clients to optimize long-term financial outcomes and achieve wealth management objectives.	The company was acquired by Creative Planning, via its financial sponsors General Atlantic and TPG, through an LBO on Mar 12, 2026 for an undisclosed amount.

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Company Name	Description	Deal Synopsis
Berman Hopkins CPAs & Associates	Provider of accounting, tax, and business advisory services intended to assist businesses and organizations with financial reporting, compliance, and strategic financial management. The company offers a range of services, including audit and assurance, tax planning and compliance, business advisory, employee stock ownership plan advisory, and valuation services, thereby enabling businesses and organizations to manage financial reporting requirements, regulatory obligations, and operational financial planning.	The company was acquired by Doeren Mayhew, via its financial sponsor Audax Private Equity, through an LBO on March 11, 2026 for an undisclosed amount.
Furstenau Financial	Provider of financial advisory services, focusing on retirement planning, investment management, and financial planning. The company works with families and business owners to manage assets and prepare for long-term financial needs, enabling clients to plan effectively for future financial security.	The company, a subsidary of LPL Financial Holdings was acquired by Carson Group, via its financial sponsor Bain Capital, through an LBO on March 11, 2026 for an undisclosed amount.
FX Transparency	Provider of foreign exchange transaction cost analysis (FX TCA) services intended to serve institutional investors.	The company was acquired by ACA Group, via its financial sponsor Genstar Capital, through an LBO on March 10, 2026 for an undisclosed amount.
Hometown Insurance Agency	Operator of an insurance agency intended to help its customers find the coverage that fits their life and budget. The company offers auto, home, renters, life, Medicare, and commercial coverage while delivering personalized policy guidance and ongoing service, enabling clients to protect assets and manage financial risk.	The company was acquired by WalkerHughes Insurance, via its financial sponsor BW Forsyth Partners, through an LBO on March 10, 2026 for an undisclosed amount.
Jaffery Insurance & Financial Services	Operator of a personalized insurance brokerage firm intended for individuals, families, and businesses. The company works with more than 20 carriers to offer customizable home, auto, business, and industry-specific insurance while providing advisory support to help clients manage risk and make informed coverage decisions.	The company was acquired by Inszone Insurance Services, via its financial sponsors Ares Capital Corporation BDC, BHMS Investments, Ares Management and Lightyear Capital, through an LBO on March 10, 2026 for an undisclosed amount.

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Company Name	Description	Deal Synopsis
Capital Now Funding	Provider of pre-settlement legal funding services intended for motor vehicle accidents and personal injury cases. The company offers lawsuit loans for fixed fees, at no interest for people involved in personal injury accident cases, thereby helping injured clients with pre-settlement legal funding to pay their bills before their cases are settled.	The company was acquired by The Forge Companies, via its financial sponsor TA Associates Management, through an LBO on March 9, 2026 for an undisclosed amount.
Yeomans Consulting Group	Provider of financial advisory and retirement planning services based in Marietta, Georgia. The company offers customized financial guidance, investment planning, and retirement services, enabling clients to manage assets and prepare for long-term financial security.	The company was acquired by Merit Financial Advisors, via its financial sponsor Constellation Wealth Capital, through an LBO on March 6, 2026 for an undisclosed amount.
CFO Hub	Provider of financial consulting services intended to outsource entire finance departments to interim CFO and project-based support. The company offers services like audit preparation, risk management, financial statement preparation, controller, due diligence readiness, back office support, and more.	The company was acquired by Carr, Riggs & Ingram, via its financial sponsors Bessemer Venture Partners and Centerbridge Partners, through an LBO on March 5, 2026 for an undisclosed amount.
JJL&W Insurance Consulting Firm	Provider of employee benefits insurance consulting services intended to serve small and large employers. The company provides group and individual health, dental, vision, life, disability, and voluntary benefits, advises on fully funded, level-funded, and self-funded plans, and supports compliance, payroll, and benefits administration, thereby enabling tailored benefits management.	The company was acquired by Trucordia, via its financial sponsor HGGC, The Carlyle Group, Blue Owl Capital and Crescent Capital Group, through an LBO on March 5, 2026 for an undisclosed amount.

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Company Name	Description	Deal Synopsis
Wampold Insurance Company	Provider of commercial and personal insurance products and services intended for individuals and businesses. The company offers various kinds of insurance and advisory services including life, health, employee, motor and other insurance, enabling businesses and individuals to manage risk, secure protection and access insurance schemes and services according to their needs.	The company was acquired by Trucordia, via its financial sponsors HGGC, The Carlyle Group, Blue Owl Capital and Crescent Capital Group, through an LBO on March 5, 2026 for an undisclosed amount.
Zerocelsius Wealth Studio	Provider of wealth management and financial advisory services intended to create personalized financial plans. The company offers financial, estate, and tax planning, investment management, risk analysis, and other related services, enabling its clients to address their specific financial needs effectively.	The company was acquired by Carson Group, via its financial sponsor Bain Capital, through an LBO on March 5, 2026 for an undisclosed amount.
Cowell Insurance Services	Provider of insurance program administration and workers' compensation claims management services serving niche commercial markets. The company focuses on classes of similar risks placed with a single carrier and offers in-house third-party administration, thereby enabling long-term agent and carrier relationships, diversified program design, and the use of modern technology.	The company was acquired by Mariner Wealth Advisors, via its financial sponsors Leonard Green & Partners and NB Capital Solutions, through an LBO on March 4, 2026 for an undisclosed amount. The transaction adds business and individual risk advisory solutions to Mariner Wealth Advisors.
Black Oak Asset Management	Provider of financial advisory and wealth management services intended to serve individuals, families, educators, and small business owners. The company specializes in comprehensive financial planning, retirement planning, investment management, tax planning, and financial coaching, thereby enabling clients to make informed financial decisions and prepare for long-term financial security and retirement confidence.	The company was acquired by RFG Advisory, via its financial sponsor Long Ridge Equity Partners, through an LBO on March 3, 2026 for an undisclosed amount.

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Company Name	Description	Deal Synopsis
BlueSky Wealth Advisors	Provider of an online wealth planning and investment management platform designed to deliver fiduciary financial guidance through a transparent fee-only model. The company offers comprehensive financial planning, proprietary investment management, and personalized advisory services, enabling high-net-worth individuals, families, and asset managers to align investment strategies with long-term financial objectives and complex tax considerations.	The company was acquired by Aspen Standard Wealth through an LBO on March 3, 2026 for an undisclosed amount.
The H Group	Provider of wealth management and financial planning services intended to serve individuals and families. The company specializes in comprehensive financial planning, investment management, retirement planning, estate planning, tax planning, and risk management, thereby helping clients align their financial decisions with long-term personal and financial goals.	The company was acquired by Wealth Enhancement Group, via its financial sponsors Primark Capital, TA Associates Management and Onex, through an LBO on March 3, 2026 for an undisclosed amount.
Applied Financial Planning	Operator of a multigenerational wealth management firm intended for individuals and families. The company offers financial planning, retirement planning, investment management, estate planning, and concierge client service, helping clients pursue financial independence and significance.	The company was acquired by Carson Group, via its financial sponsor Bain Capital, through an LBO on March 2, 2026 for an undisclosed amount.
DryPowder	Developer of an enterprise-grade financial operating system designed to automate accounts receivable workflows. The company's system automates collections processes, lets customers track credit purchases, manage outstanding invoices, and make payments without having to contact the credit team, enabling credit teams to improve cash flow and reduce operating costs.	The company was acquired by ECI Software Solutions, via its financial sponsors GIC Private, Apax Partners and Leonard Green & Partners, through an LBO on March 2, 2026 for an undisclosed amount. This acquisition accelerates ECI Software Solutions's vision of delivering intelligent, embedded financial workflows across its industry-specific ERP platforms, helping customers improve the full invoice-to-cash lifecycle.

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Company Name	Description	Deal Synopsis
Edge Financial Advisors	Provider of investment advisory services intended to help individuals, families and business owners make financial decisions. The company offers financial planning, investment services and defined benefit plans for various people, enabling clients to protect and grow their financial resources.	The company was acquired by Cerity Partners, via its financial sponsors Genstar Capital, Harvest Partners and Lightyear Capital, through an LBO on March 2, 2026 for an undisclosed amount.
Euclid Transactional	Developer of a vertically integrated insurance platform designed to simplify commercial insurance and enable efficient risk management. The company offers an AI-driven platform with unified data ownership, in-house models, real-time analysis, and integrated underwriting, distribution, and servicing workflows, enabling private companies and commercial insurers to assess risk continuously and make informed insurance decisions.	The company was acquired by CRC Insurance Services, via its financial sponsors Clayton, Dubilier & Rice, Mubadala Investment Company and Stone Point Capital, through an LBO on March 2, 2026 for an undisclosed amount.
Finley (Financial Software)	Developer of debt management software designed to simplify capital raising and management. The company's software features the ability to automate debt capital operations, ensure credit agreement compliance, and centralize knowledge from across the organization, enabling financial companies to automate due diligence, and compliance, and streamline ongoing reporting with capital providers.	The company was acquired by Concord Servicing, via its financial sponsors Balance Point Capital and GTCR, through an LBO on March 2, 2026 for an undisclosed amount. The acquisition adds Finley's Credit Management System to Concord Servicing's capital markets administration offering.
Insight Wealth Strategies	Provider of a fee-only financial planning platform designed to help individuals and business owners define, achieve, and preserve their long-term financial objectives. The company offers comprehensive retirement planning, estate and succession planning, wealth management, and risk assessment services, enabling individuals, families, and business owners to accumulate, protect, and transfer wealth in alignment with their personal and professional goals.	The company was acquired by Choreo, via its financial sponsor Parthenon Capital Partners, through an LBO on March 2, 2026 for an undisclosed amount.

Financial Services Deals for March 2026

Company Name	Description	Deal Synopsis
PRL Associates	Provider of insurance brokerage services intended to secure comprehensive risk protection for individuals and businesses. The company offers access to multiple established insurance carriers and personalized policy advisory services, enabling individual policyholders and commercial enterprises to obtain appropriate coverage at competitive terms with ongoing professional support.	The company was acquired by King Risk Partners, via its financial sponsors BHMS Investments and Lightyear Capital, through an LBO on March 2, 2026 for an undisclosed amount.
FlexShopper	FlexShopper Inc is a financial technology company engaged in providing certain types of durable goods to consumers on a lease-to-own basis and providing lease-to-own (LTO) terms to consumers of third-party retailers and e-tailers. Its products include electronics, computers, furniture, mattresses, cameras and camcorders, audio, musical instruments, health, fitness and sports, video games, homes, gardens and tools, appliances, and vacuums on a payment, lease basis. The firm generates a majority of its revenue by leasing its products. The company enables consumers utilizing its e-commerce marketplace to shop for brand-name electronics, home furnishings, and other durable goods on a lease-to-own (LTO) basis.	The company was acquired by Snap Finance, via its financial sponsors Rock Creek Capital and Summit Partners, through an LBO in approximately March 2026 for an undisclosed amount through a public-to-private transaction.
Legacy Wealth Management	Provider of wealth management services catering to its clients across Plantation, Florida. The company offers a list of services including financial planning, asset management, risk management, trust services and other services.	The company was acquired by Modern Wealth Management, via its financial sponsor Crestview Partners, through an LBO in March 2026 for an undisclosed amount.