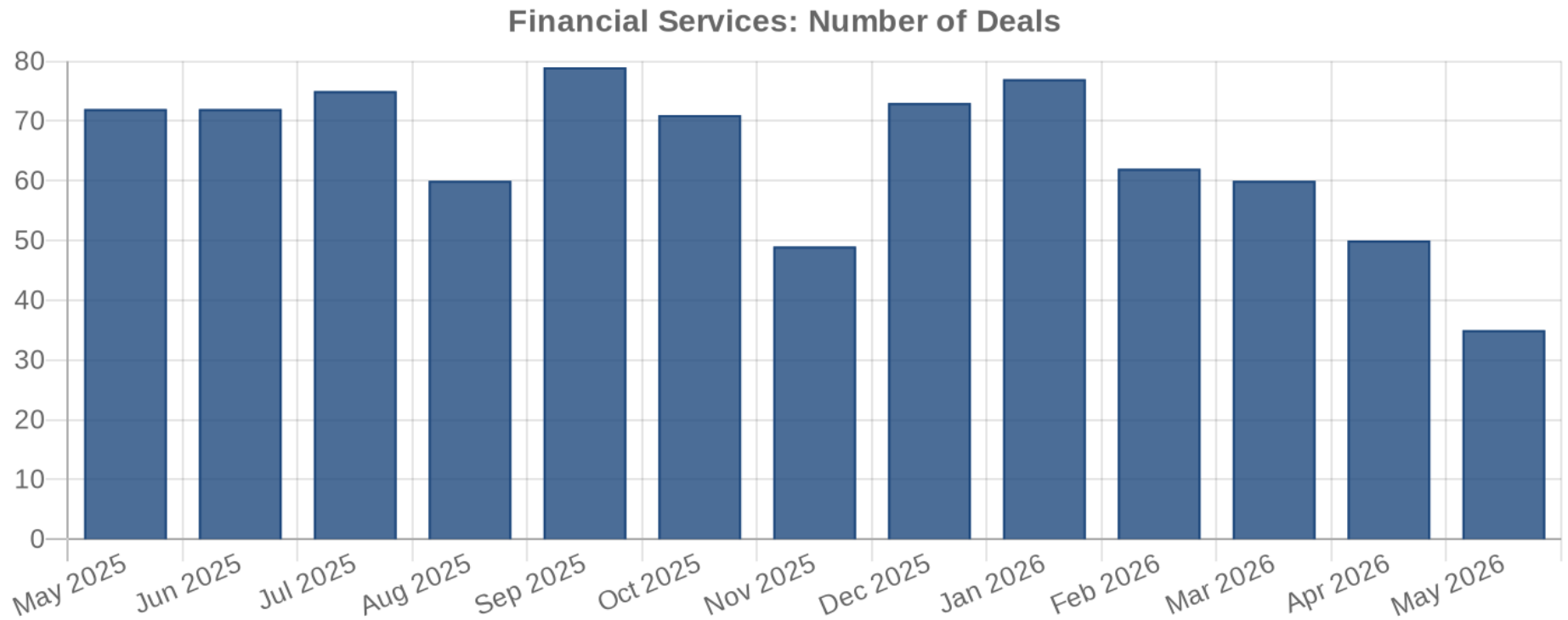


# Financial Services Deals for May 2026

There were 35 completed U.S. private equity deals in the Financial Services sector during the month of May. The number of deal transactions decreased 30.0% when compared to April's deal count. There was a 51.4% decline in the number of Financial Services deals compared to May 2025.



## Financial Services Deals for May 2026

Company Name	Description	Deal Synopsis
Coastal Insurance Services (Insurance Brokers)	Provider of health insurance and benefits advisory services designed to help individuals and families navigate healthcare coverage selection and long-term protection planning. The company offers Medicare guidance, health insurance enrollment, supplemental coverage options, prescription plan advisory, and personalized policy review services, enabling individuals, senior citizens, and families to access suitable healthcare coverage with improved clarity and financial protection.	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 May 14, 2026 for an undisclosed amount.
Cooley & Associates	Provider of accounting and tax services intended to assist clients with financial goals. The company offers tax compliance, financial planning, investment management, accounting services, estate strategies, and retirement planning, enabling individuals and small businesses to manage financial reporting and minimize taxes.	The company was acquired by Waverly Advisors, via its financial sponsors Ares Capital Corporation BDC, HGGC and Ares Management, through an LBO on May 29, 2026 for an undisclosed amount.
Coriano Insurance Agency	Provider of independent insurance brokerage services intended to support individuals, businesses, and property owners across Arizona. The company offers auto, home, life, business, and landlord insurance through a network of multiple insurance carriers, specializing in personalized brokerage and coverage comparison services, enabling clients to access suitable insurance options across Arizona.	The company was acquired by Inszone Insurance Services, via its financial sponsor Ares Capital Corporation BDC, BHMS Investments, Ares Management, and Lightyear Capital through an LBO on May 6, 2026 for an undisclosed sum.
Crunchfirm	Operator of a boutique finance firm intended for VC-backed startups. The company offers strategic CFO services, financial modeling, controlling, payroll, cap table management, full-service tax, and daily financial operations, bringing the depth and speed that venture-stage companies need.	The company was acquired by Ampleo, via its financial sponsors Brooks Growth Partners and Unity Partners, through an LBO on May 20, 2026 for an undisclosed amount.
Derivitec	Developer of risk management software designed to cover risk needs from initial analysis to final attribution. The company's software offers the shareability to onboard new clients, flexibility to construct reports, and takes all the detailed information before it becomes a problem, enabling financial companies to increase transparency and streamline trading operations relating to complex derivatives.	The company was acquired by ActiveViam, via its financial sponsor Nordic Capital, through an LBO on May 28, 2026 for an undisclosed amount.

Company Name	Description	Deal Synopsis
Dwolla	Developer of a payment platform designed to facilitate account-to-account transfers and automate electronic payment processing. The company's platform features API integration for ACH, real-time payments, instant account verification, balance checks, and secure transfer capabilities, enabling insurance, lending, real estate, healthcare, and manufacturing industries to improve payment speed, efficiency, security, and overall transaction management.	The company was acquired by Network Merchants, via its financial sponsors Great Hill Partners, Insight Partners and Francisco Partners, through an LBO on May 19, 2026 for an undisclosed amount.
Economic Group Pension Services	Provider of retirement planning and administration services intended to offer tailored solutions for clients' retirement plan needs. The company offers industry-leading plan design, administration, actuarial consulting, and 3(16) fiduciary services to help increase its tax savings and provide benefits to employees, thereby offering clients personalized service to reach their personal and organizational objectives.	The company was acquired by Blue Ridge ESOP Associates, via its financial sponsors Levine Leichtman Capital Partners and CNL Strategic Capital, through an LBO on May 7, 2026 for an undisclosed amount.
Ecosystem Impact Fund II	Operator of a holding company invested across wealth, retirement, asset management and capital markets technology sector in United States.	The company was acquired by 7RIDGE through an LBO on May 14, 2026 for an undisclosed amount.
enomyc	Operator of a leading management consultancy platform intended to revitalise and future-proof mid-market enterprises through integrated strategic, financial, and operational advisory. The company offers expertise spanning corporate strategy, financial advisory, transformation, and restructuring, enabling upper mid-market corporates to achieve sustainable growth and financial resilience.	The company was acquired by Ufenau Capital Partners through an LBO on May 7, 2026 for an undisclosed amount.
Equipment Leasing Services	Provider of an equipment financing platform intended to help businesses acquire industrial and commercial machinery while preserving operational capital. The company offers flexible leasing programs, customized financing structures, and industry-specific equipment funding capabilities, thereby enabling businesses across manufacturing, transportation, construction, and healthcare sectors to expand operations with improved financial flexibility.	The company was acquired by Trinity Capital through an LBO on May 26, 2026 for an undisclosed amount. The transaction was supported by debt financing.
FGI Worldwide	Provider of commercial financing and risk management services intended to support companies' international and domestic growth. The company's range of products and services includes asset-based lending, web-based credit insurance management, factoring, foreign exchange services, credit insurance, credit information and other related services, enabling small and medium enterprises to benefit from flexible and customized lending.	The company was acquired by Goldman Sachs Asset Management through an LBO on May 12, 2026 for an undisclosed amount. The acquisition enables the company to accelerate its growth and expand its suite of financing, risk and Insurtech solutions for clients.

Company Name	Description	Deal Synopsis
Finadium	Provider of market research and consultancy services intended to provide research and consultancy for the securities finance and capital markets industries. The company offers specialized industry reports, strategic advisory, international market conferences, video interviews, client webinars, and regular regulatory updates, thereby enabling capital markets and repo professionals to gain insights into securities finance and collateral management.	The company was acquired by EquiLend Holdings, via its financial sponsors Welsh, Carson, Anderson & Stowe and Ares Management, through an LBO on May 12, 2026 for an undisclosed amount. The acquisition expands EquiLend's access to market intelligence, consultancy capabilities, and reinforces its position as a comprehensive resource for the global securities finance community.
Financially In Tune	Provider of financial education and advisory services intended to improve personal financial literacy and long-term wealth management. The company offers budgeting guidance, retirement planning support, and financial coaching services, thereby enabling individuals and families to strengthen financial decision-making.	The company was acquired by Beacon Pointe Advisors, via its financial sponsor Kohlberg Kravis Roberts, through an LBO on May 19, 2026 for an undisclosed amount.
Flaharty Asset Management	Provider of financial planning, wealth management, and advisory services intended to cater to individuals, institutional clients, and pension planners. The company offers investment management, retirement planning, trust services, educational planning, insurance planning, and strategic partner collaboration, enabling clients to manage their portfolio in a personalized manner.	The company was acquired by Modern Wealth Management, via its financial sponsor Crestview Partners, through an LBO on May 29, 2026 for an undisclosed amount.
Fortegra	Provider of insurance products and third-party administration services intended to offer a diverse set of admitted and surplus insurance products. The company focuses on niche business lines and fee-oriented services, providing with a unique combination of specialty insurance program underwriting, warranty and service contract products and related service solutions.	The company was acquired by DB Insurance through a \$1.65 billion LBO on May 29, 2026.
Frost-Arnett	Operator of a debt collection agency intended to resolve the patient-pay balance of accounts receivable for healthcare providers. The company offers collections, recovery on delinquent accounts, early-out, return on investment-enhancing, insurance follow-up, pre-registration, and extended business office services, thereby helping clients strengthen cash flow, maximize reimbursement and reduce A/R write-offs.	The company was acquired by Harris & Harris, via its financial sponsor Clarion Capital Partners, through an LBO on May 4, 2026 for an undisclosed amount.
Hilton Head Landscapes	Provider of landscaping services intended to create personalized outdoor spaces. The company offers landscape design, landscape installation, landscape maintenance, lawn care, irrigation management, and hardscaping, enabling residential and commercial clients to transform outdoor areas into functional extensions of their properties.	The company was acquired by Juniper Landscaping, via its financial sponsors Bregal Partners and L Capital, through an LBO on May 28, 2026 for an undisclosed amount.

Company Name	Description	Deal Synopsis
Jazz Wealth Managers	Provider of financial advisory and investment management services intended to serve individual investors and retirees in the United States. The company offers portfolio management, retirement income planning, tax-aware investing and ongoing financial guidance through a registered investment advisory model, focusing on transparent fees and rules-based decision-making to support long-term wealth management.	The company was acquired by Steward Partners Global Advisory, via its financial sponsors Ares Management, Cynosure Partners and The Pritzker Organization, through an LBO on May 5, 2026 for an undisclosed amount.
Launch Environmental	Provider of specialty underwriting services designed for environmental risk mitigation and asset protection. The company's platform integrates collaborative underwriting frameworks, risk assessment expertise, and tailored coverage structures, enabling brokers and clients to safeguard assets, brand reputation, and financial stability against environmental events.	The company, a subsidiary of Launch Underwriters, was acquired by Sands Point Risk, via its financial sponsor Avesi Partners, through an LBO on May 18, 2026 for an undisclosed amount.
Legacy Partners Insurance Services	Provider of insurance services catering to Harrison Twp, Michigan. The company offers personal insurance, commercial insurance, group benefits, life insurance, annuities, and long-term care through which they serve their clients.	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 May 21, 2026 for an undisclosed amount.
Lilo (Business/Productivity Software)	Operator of a purchasing platform intended to onboard vendors, find new vendors, order in one place, and pay digitally. The company's platform specializes in providing a marketplace to purchase all hotel supplies, enabling hotel owners to spend more time taking care of their guests and less time procuring supplies.	The company was acquired by Inn-Flow, via its financial sponsor Mainsail Partners, through an LBO on May 4, 2026 for an undisclosed amount.
Luminor Risk	Provider of underwriting services intended to provide insurance capacity for catastrophe-exposed property risks. The company offers automated document review, data extraction, real-time analytical support, proprietary modeling infrastructure, and AI-embedded decision making, providing wholesale brokers with lead capacity for complex commercial property risks.	The company was acquired by The D. E. Shaw Group through an LBO on May 28, 2026 for an undisclosed amount.
McGohan Brabender Agency	Provider of insurance brokerage services intended for reimagining employee benefits. The company also offers employee benefit consulting, health risk management, brokerage consulting, and insurance advisory services, thereby helping its clients to control costs, improve health, and sustain the results of their employees.	The company was acquired by Higginbotham, via its financial sponsors Blackstone, Stone Point Capital and The Carlyle Group, through an LBO on May 6, 2026 for an undisclosed amount.

Company Name	Description	Deal Synopsis
Naesip	Provider of environmental and pollution insurance services intended to help businesses and agents secure appropriate risk coverage. The company offers general liability, contractors' pollution liability, environmental impairment liability, professional coverage, and risk assessment support with lead qualification and loss control tools, enabling insurance agents and businesses across environmental and non-environmental sectors to identify coverage gaps and obtain suitable protection against pollution-related risks.	The company was acquired by United Commercial Program Managers, via its financial sponsor Bregal Sagemount, through an LBO on May 6, 2026 for an undisclosed amount.
Peak Group Companies	Provider of water management and infrastructure services intended for municipal, industrial, and commercial applications. The company offers water and wastewater equipment, system maintenance, trenchless pipe rehabilitation, custom water treatment systems, and related field services through its portfolio of operating companies, enabling clients to maintain and optimize critical water infrastructure systems.	The company was acquired by United Flow Technologies, via its financial sponsors Berkshire Partners and H.I.G. Capital, through an LBO on May 27, 2026 for an undisclosed amount.
Peakstone Realty Trust	Peakstone Realty Trust is an internally managed, publicly registered real estate investment trust (REIT) that owns and operates predominately single-tenant industrial and office properties with creditworthy tenants and long-term leases. Peakstone's portfolio consists of newer vintage, and well-located real estate assets in majorly high-growth coastal and sunbelt markets. The Industrial segment consists of industrial outdoor storage properties which have a low building-to-land ratio, or low coverage, maximizing yard space for the display, movement, and storage of materials and equipment.	The company was acquired by Brookfield Asset Management through an estimated \$1.847 billion public-to-private LBO on May 6, 2026. The acquisition provides Brookfield Asset Management with a scaled portfolio in a sector supported by durable demand drivers, limited institutional ownership, and increasing occupier need for well-located logistics infrastructure.
Princeton Agencies	Provider of insurance services intended to provide financial protection and risk mitigation. The company offers independent agency licensing, risk management analysis, personalized insurance planning, 24/7 support, claims handling, enabling individuals and businesses to access customized coverage from multiple carriers to eliminate gaps and manage exposures.	The company was acquired by OneDigital, via its financial sponsor CPP Investments, Onex, and Stone Point Capital, through an LBO on May 19, 2026 for an undisclosed amount.
Richardson Insurance Services	Provider of insurance services intended for personal and commercial lines businesses. The company offers automobile, individual life, Medicare, workers' compensation, and self-storage insurance, enabling clients to get easy coverage from uncertain risks and claim support.	The company was acquired by Trucordia, via its financial sponsors Blue Owl Capital BDC, The Carlyle Group, HGGC, Crescent Capital Group, and Blue Owl Capital, through an LBO on May 7, 2026 for an undisclosed amount.

Company Name	Description	Deal Synopsis
Smith & Company Insurance	Provider of personal and commercial insurance services intended to help individuals, families, and businesses secure risk coverage through an independent agency model. The company offers multi-carrier policy placement, claims support, billing assistance, and certificate management, enabling residents, business owners, and commercial operators across Arkansas to access tailored coverage and ongoing policy administration.	The company was acquired by Inszone Insurance Services, via its financial sponsors BHMS Investments, Ares Management, Ares Capital Corporation BDC, and Lightyear Capital, through an LBO on May 12, 2026 for an undisclosed amount.
Stillwater Capital Advisors	Provider of wealth management and financial planning services intended to support individuals, families, and businesses in managing investments and financial goals. The company engages in offering investment management, retirement planning, asset allocation, and financial advisory services, specializing in customized wealth strategies and risk assessment solutions, enabling clients to manage long-term financial and investment objectives.	The company was acquired by CAPTRUST Financial Advisors, via its financial sponsors GTCR and The Carlyle Group, through an LBO on May 14, 2026 for an undisclosed amount.
The First National Bank of Lacon	Operator of a locally owned, independent community bank based in the United States. The company's services include agricultural lending for operating expenses, machinery, livestock, and real estate, commercial loans for equipment, land, buildings, and lines of credit, residential real estate loans, automobile and personal loans, checking and savings accounts, money market deposit accounts, certificates of deposit, traditional and Roth IRAs, online banking, bill pay, and mobile banking, with all loan decisions made locally by on-site officers, enabling individual consumers, small businesses, and agricultural operators in the central Illinois market to access deposit, lending, and digital banking services through a single locally managed institution.	The company was acquired by Pluto Investments through an LBO in approximately May 2026 for an undisclosed amount.
The Oak Group (Hudson Valley)	Provider of wealth management, investment advisory, and financial planning services. The company's services include retirement planning, estate considerations, and risk management within a broader advisory relationship, enabling independent clients to manage investments and plan for long-term financial objectives.	The company, a subsidiary of Wells Fargo Advisors, was acquired by Arax Investment Partners, via its financial sponsors RedBird Capital Partners and Weatherford Capital, through an LBO on May 5, 2026 for an undisclosed amount.
Three Square Markets	Provider of micromarket technology and self-service retail services intended for the micro market industry. The company develops integrated kiosks, software platforms and payment technologies, thereby helping foodservice and convenience services operators to optimize operations, increase engagement and maximize profitability.	The company, a subsidiary of Cantaloupe, was acquired by Seaga Manufacturing, via its financial sponsors Dominus Capital, Flexstone Partners and Hauser Private Equity, through an LBO on May 11, 2026 for an undisclosed amount.

Company Name	Description	Deal Synopsis
Wealth Conscious Management	Provider of wealth management services intended to help individuals navigate financial wellness. The company offers investment advisory, financial planning, and portfolio management services, enabling clients to simplify complex financial scenarios through integrated technology and personalized guidance.	The company was acquired by Mariner Wealth Advisors, via its financial sponsors Leonard Green & Partners, NB Capital Solutions and NB Private Equity Partners, through an LBO on May 31, 2026 for an undisclosed amount.
Wisdom Rock Financial Advisory Group	Provider of wealth management and financial advisory services intended for individuals, families and business owners. The company offers investment management, retirement planning, estate planning, tax strategy, and financial planning services through a personalized advisory model, enabling clients to achieve their financial goals.	The company, a subsidiary of Ameriprise Financial, was acquired by Steward Partners Global Advisory, via its financial sponsors Ares Management, Cynosure Partners and The Pritzker Organization, through an LBO on May 6, 2026 for an undisclosed amount.