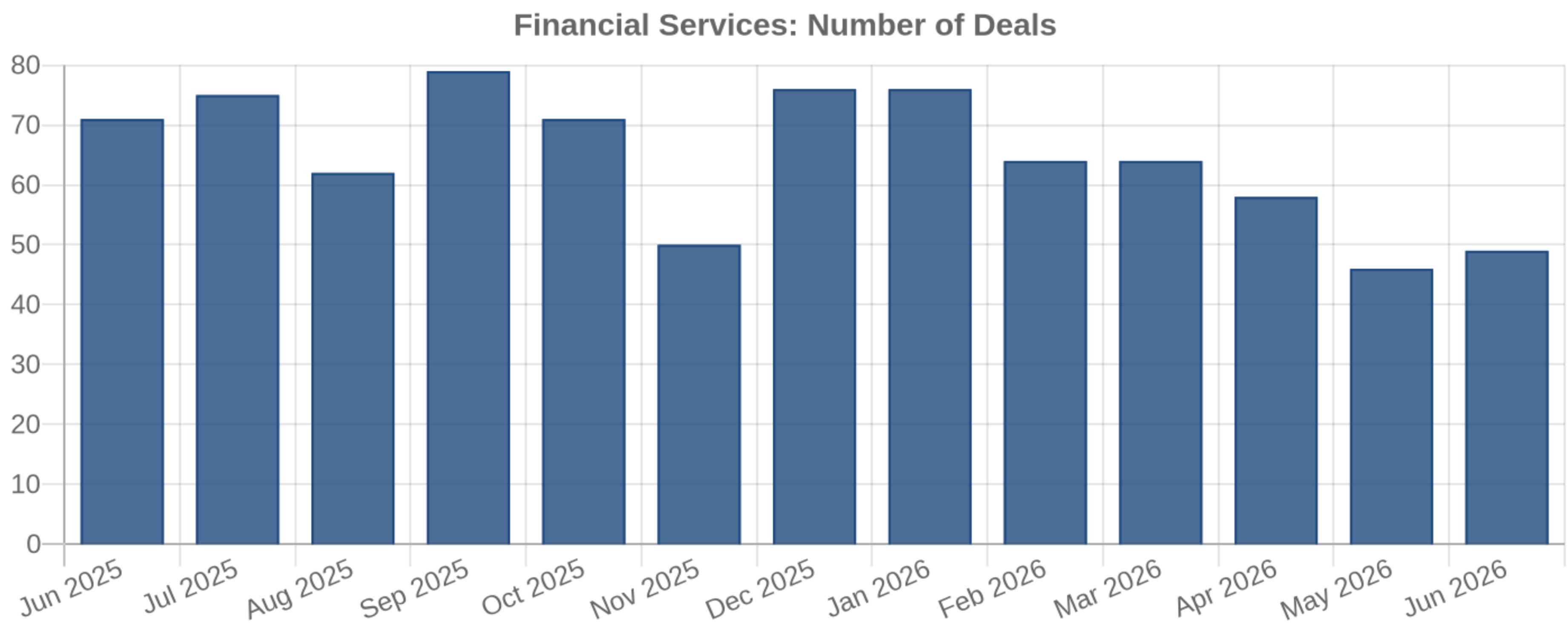
Financial Services Deals for June 2026

There were 49 completed U.S. private equity deals in the Financial Services sector during the month of June. The number of deal transactions increased 6.5% when compared to May's deal count. There was a 31.0% decline in the number of Financial Services deals compared to June 2025.



Financial Services Deals for June 2026

Company Name	Description	Deal Synopsis
Access Capital (Wichita)	Provider of financial advisory services intended to create customized investment strategies for individuals and institutions. The company offers financial planning, portfolio management, investment management, risk management, business planning, and longevity planning services, thereby enabling clients to receive personalized financial advice tailored to specific life goals.	
Advocatia Solutions	Developer of an online benefits enrollment platform designed to offer healthcare coverage programs. The company's platform helps to streamline the financial assistance process by providing an optimized workflow tool to obtain coverage and eliminate follow-up appointments, enabling healthcare organizations to get the ability to engage and enroll their customers into programs that reduce costs and improve health outcomes.	
Anfield Capital Management	Provider of an institutional-focused investment-management service intended for portfolio construction, risk oversight, and outsourced chief investment officer support. The company offers macro-informed asset-allocation processes and customizable investment services, enabling clients to manage portfolios with greater structure and discipline.	
Benefit Planning	Provider of financial planning and wealth advisory services intended to help individuals, families, business owners, and executives achieve their long-term financial goals. The company specializes in complex estate and legacy planning, retirement planning, wealth management, and executive benefits consulting, enabling clients to preserve wealth, optimize executive compensation, and implement customized financial strategies.	
BenefitRiver	Provider of insurance brokerage and employee benefits services for individuals and businesses across Colorado and Montana. The company offers group health insurance, life insurance, commercial liability coverage, property insurance, and workers' compensation policies while working with multiple carriers and providing policy management, claims support, and comparison tools, thereby enabling clients to select and manage coverage suited to their employee benefit programs through a relationship-focused service model.	

Company Name	Description	Deal Synopsis
Blanton & Griffin Insurance Agency	Provider of insurance brokerage services intended to offer financial protection for commercial and personal assets. The company offers commercial insurance, personal insurance, auto insurance, business policies, liability coverage, and property insurance, providing businesses and individuals with risk mitigation and financial security.	
Brightworks Wealth Management	Provider of investment management services intended to help families and professionals navigate complex financial decisions. The company delivers integrated investment management and financial planning under a fiduciary standard, providing wealth management, advisory services, portfolio oversight, and retirement strategy to families, professionals, business owners, and foundations, enabling them to achieve their financial goals through personalized guidance and long-term relationships.	
Davis Paint & Collision	Operator of an automotive repair facility intended to restore vehicles to their original condition. The company offers collision repair, paintless dent repair, mechanical services, auto paint services, hail damage repair, and car rental services, providing individual vehicle owners with maintenance and restoration after accidents.	
Dealers Auto Auction Of The Rockies	Operator of a vehicle auction platform designed to facilitate wholesale vehicle transactions. The company offers vehicle auctions, transportation, title processing, reconditioning, mechanical inspection, and online bidding, thereby enabling automotive dealers to buy, sell, and transfer vehicles efficiently.	
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.	
Elbert Insurance Associates	Provider of insurance brokerage services intended to protect families and businesses from unforeseen financial burdens. The company offers auto, home, umbrella, business, general liability, and workers' compensation insurance, providing individuals and commercial clients with access to multiple carrier markets to secure coverage tailored to specific risk exposures.	

Company Name	Description	Deal Synopsis
Equilibrium Capital Services	Operator of a broker-dealer platform intended to provide brokering services. The company is currently operating in Stealth mode.	
Euclid Design Underwriters	Provider of professional liability insurance underwriting services intended for architects and engineers. The company offers specialized errors and omissions coverage and managing general agency services, enabling design professionals to mitigate financial risks through tailored insurance policies and technical risk assessment.	
Flow	Developer of a dashboard and delegation platform designed to help brokers and their teams streamline the placement process for large commercial insurance. The company's platform specializes in an insurance digital marketplace, groundbreaking artificial intelligence-based risk appetite matching, marketing summary, detailed reports on carriers' risk appetite, and an automated renewals process, enabling users to turbo-charge the renewal process using automation and AI-based prediction.	
FNF Family of Companies	Provider of title insurance and real estate settlement services intended for the property transaction sector. The company offers national underwriting support, automated settlement workflows, and title policy issuance, enabling title agents and real estate professionals to facilitate secure and efficient property transfers across the United States.	
HES Facilities Management	Provider of facilities management services focused on educational institutions. The company offers custodial, maintenance, cleaning, groundskeeping, and landscaping services, delivering clean, attractive, and safe learning environments, thereby creating tangible, long-term benefits for the clients, employees, and investors.	
Horsepower Automotive Group	Operator of a holding company based in the Mesa, Arizona area. The company operates in the off-road automotive aftermarket industry.	
Indemnity Excess and Surplus Agency	Provider of wholesale insurance services intended for retail agents across the United States. The company specializes in professional, employment practices, and directors and officers liability, as well as physician malpractice and product liability, enabling retail partners to access specialized coverage and surplus specialty resources.	

Company Name	Description	Deal Synopsis
Jackson Wealth Management	Provider of wealth management services intended to help clients achieve financial freedom. The company utilizes active trend-following and tactical asset allocation through a coordinated approach involving financial planning, investment management, tax strategy, and estate planning, providing high-net-worth individuals with personalized strategies to support long-term financial goals.	
Janus Henderson Investors	Janus Henderson Group provides investment management services to retail intermediary (49% of managed assets), self-directed (20%) and institutional (31%) clients. At the end of 2025, active equities (52%), fixed-income (32%), balanced (12%) and alternative (4%) investment platforms constituted the company's $493.2 billion in assets under management. Janus Henderson sources most of its managed assets from clients in North America (65%), with customers from Europe, the Middle East, Africa, and Latin America (26%) and the Asia-Pacific region (9%) accounting for the remainder.	The company was acquired by General Catalyst, Qatar Investment Authority, Sun Hung Kai & Company and Trian Fund Management through a $8.04 billion through an public-to-private LBO on June 30, 2026. The transaction values the company at $10.13 billion.
LandGate	Developer of an online real estate and energy deals marketplace designed to digitize energy and infrastructure, and merge it with real estate. The company's marketplace offers tools for site selection, origination, development, financing, and market analysis of United States energy and infrastructure projects, such as data centers, energy storage, electric vehicles, solar, wind, carbon, and natural gas, enabling investors, developers, real estate professionals, and property owners to connect for commercial real estate and energy-related transactions.	
LF Insurance Group	Provider of insurance brokerage services intended to offer customized personal and business risk solutions. The company offers business owners' policy, general liability insurance, workers' compensation insurance, homeowners insurance, auto insurance, and cyber liability insurance, enabling individuals and businesses to protect their assets and income through comprehensive risk assessment and tailored coverage plans.	
MAI Capital Management	Provider of wealth management and advisory services intended to serve individuals, families and businesses. The company offers financial and retirement, investment management, insurance and risk, trust and estate planning and tax solutions, thereby helping clients achieve their goals and build wealth.	The company was acquired by The Carlyle Group through an estimated $2.8 billion LBO on June 4, 2026. The transaction was supported by $413 million of debt financing.

Company Name	Description	Deal Synopsis
Marmo Financial Group	Provider of financial advisory services intended to help clients achieve long-term goals. The company offers investment management, financial planning, retirement planning, estate planning, qualified plan advisory, and insurance auditing, enabling individuals and businesses to develop integrated roadmaps for wealth preservation.	
Mill Creek Capital Advisors	Provider of wealth advisory and investment management services intended for high-net-worth families and institutions. The company offers wealth strategy, investment execution, and family office coordination, enabling clients to preserve capital and manage complex financial legacies through independent portfolio management and multi-generational planning.	
Millares & Company	Provider of fee-only wealth management and financial advisory services designed to help individuals, families, and businesses make informed investment decisions. The company offers fiduciary investment management, tax planning, and financial advisory services grounded in academic research principles, enabling clients to achieve long-term financial goals with transparency and alignment of interests.	
myCIO Wealth Partners (Advisory Team in Philadelphia, Pennsylvania)	Provider of investment advisory services intended to provide wealth management and financial planning. The company offers portfolio management, retirement plan consulting, fiduciary advisory, and financial planning, thereby enabling individuals, families, and institutional investors to manage investments and financial affairs.	
Northridge Infrastructure Solutions	Operator of a specialized utility services platform focused on maintaining utility transmission and distribution (T&D) infrastructure for investor-owned utilities, cooperatives, municipal utilities, and gas pipelines across North America. The company focuses on aerial utility services, field services and engineering services.	
Northstar Financial Planners	Provider of financial planning and portfolio management services intended for financial goal achievement and risk optimization. The company offers financial planning advice, portfolio management services, investment implementation, risk assessment, diversified portfolio design, and objective financial consulting, enabling individual clients and investors to achieve financial objectives through diversified investment portfolios and objective advisory services.	
Olstein Capital Management (Fund Management Business)	A Fund Management Business located in the United States.	

Company Name	Description	Deal Synopsis
Opes Advisors	Provider of wealth management and financial advisory services intended to serve individuals, families and business owners. The company offers investment management, retirement planning, tax planning, estate planning and family advisory services through a comprehensive financial planning approach, thereby helping clients make informed financial decisions aligned with their long-term objectives.	
Professional Insurance Strategies	Provider of insurance brokerage services intended to protect families and businesses. The company offers home insurance, auto insurance, commercial insurance, general liability insurance, property insurance, and business auto insurance, enabling individuals and commercial clients to access customized coverage from multiple carriers.	
Rebills	Operator of a subscription management software company based in the United States.	
Red Tortoise (Atlanta)	Provider of wealth management and investment advisory services intended for individuals and families seeking long-term financial planning and portfolio management. The company's platform offers fiduciary investment management, retirement planning, tax-aware investment strategies, portfolio rebalancing, and ongoing financial guidance, enabling clients to build, preserve, and manage wealth through customized, diversified investment services.	
Relation Insurance	Provider of insurance brokerage services intended for education, employee benefits, public entities, and the transportation sector. The company offers insurance products like casualty, property, personal lines, employee benefits, and retirement, enabling clients to help save time and regain control over insurance decisions.	
Richard Brothers Financial Advisors	Provider of wealth management services intended to help individuals and businesses achieve long-term financial goals. The company offers wealth management, financial planning, investment advisory, retirement consulting, succession planning, and insurance planning, enabling clients to manage personal and business wealth through an integrated framework.	
Sanford, Bruker & Banks	Provider of independent insurance and bonding services intended for individuals and commercial clients. The company offers business, home, auto, and life insurance, along with specialized bonding for artisan contractors, enabling families and small businesses to secure comprehensive financial protection through customized policy management.	

Company Name	Description	Deal Synopsis
Scantek (Other Commercial Services)	Provider of information management and digital conversion services intended to help organizations transition to paperless operations. The company offers document scanning, microfilm conversion, cloud-based hosting, workflow automation, and secure records archiving, enabling clients in the government, healthcare, and education sectors to improve data accessibility and streamline business processes through customized and scalable imaging services.	
Sellwood Investment Partners	Provider of investment advisory and consulting services intended for institutional and high-net-worth investors seeking portfolio management and fiduciary guidance. The company offers customized investment portfolio design, asset allocation, policy development, manager selection, due diligence, performance reporting, and risk management services, enabling clients to optimize long-term investment performance and achieve financial objectives.	
Sila Realty Trust	Sila Realty Trust Inc is a real estate investment trust. Its investment objective is to pay regular cash distributions to stockholders and to preserve, protect, and return capital contributions to stockholders. The company owns and manages healthcare assets. The company generates revenue from real estate investments in healthcare properties.	The company was acquired by Blue Owl Capital through a $2.40 billion public-to-private LBO on June 26, 2026.
Smithfield Trust Company	Provider of fiduciary and wealth management services intended to serve individuals, families, trusts, estates, and institutions. The company specializes in trust administration, investment management, estate planning and administration, tax planning, and family office services, thereby helping clients manage assets, administer trusts and estates, and support long-term wealth preservation and transfer.	
SSH Real Estate	Operator of commercial property services designed for investment, brokerage, and facility management purposes. The company's platform includes tenant and landlord representation, multi-sector property acquisition, full-service building operations, financial reporting, and maintenance across office, industrial, and mixed-use assets, enabling real estate owners and institutional investors to manage portfolios with improved operational efficiency, market responsiveness, and long-term asset value.	

Company Name	Description	Deal Synopsis
The Roberts Agency	Operator of an independent insurance agency intended to cater to the home builders, trade contractors, and heavy construction contractors. The company specializes in commercial coverage, general liability, workers' compensation, inland marine insurance, cyber insurance, surety bonds, management liability, group health insurance, retirement plans, and long-term care, enabling clients to access many companies and individual services.	
Turbeville Insurance Agency	Provider of insurance brokerage and risk assessment services intended for financial security and asset protection. The company offers auto insurance, home insurance, life insurance, health insurance, business insurance, commercial liability, workers' compensation, and umbrella policies, enabling individuals and businesses to secure tailored coverage through objective policy comparisons and access to multiple insurance carriers.	
Velten Waterhouse Advisors	Provider of wealth management and retirement planning services intended for individuals and couples. The company offers retirement income strategies, annuity products, and financial protection planning, enabling clients to secure their lifestyle and achieve long-term financial independence through tailored investment guidance.	
Vinli	Developer of a connectivity and mobility data intelligence platform designed for operational optimization and risk mitigation in the automotive sector. The company's platform synthesizes raw vehicle data from original equipment manufacturers, aftermarket devices, and driver behavior telematics, and utilizes a dedicated architecture to sift, organize, and correlate this information to generate concrete, actionable insights and predictive analytics, enabling fleet operators, insurance underwriters, and other mobility businesses to manage assets, assess driving risk, and develop new data-driven service offerings.	
WealthShield Partners	Provider of investment advisory services intended to protect and grow clients' wealth while expanding their businesses. The company specializes in business formation, asset management, retirement planning, company valuation, risk assessment and other related services, enabling advisors to achieve their operational needs and objectives of their business while mitigating future uncertainties effectively.	

Company Name	Description	Deal Synopsis
Webtec Insurance Services	Provider of insurance brokerage services intended to offer personal coverage options. The company offers automobile, homeowners, motorcycle, recreational vehicle, boat, and claims direction services, enabling individuals to compare and secure insurance policies from multiple carriers through paperless online transactions.	
Wyoming Trust Company	Provider of trust and wealth management services intended to serve families, advisors, and estate professionals. The company offers revocable and irrevocable trusts, dynasty trusts, asset protection structures, estate planning, and investment advisory, enabling clients to preserve wealth across generations with tax efficiency, privacy, and fiduciary accountability.	