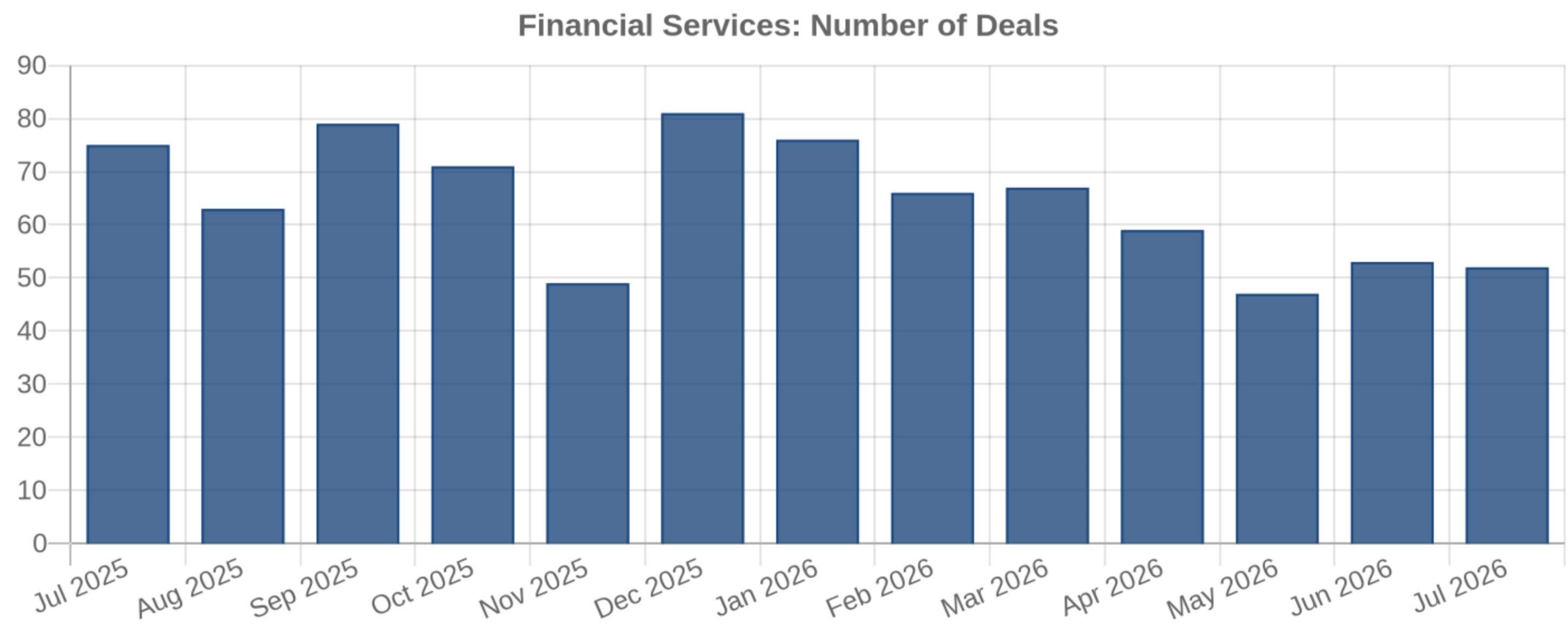
Financial Services Deals for July 2026

There were 52 completed U.S. private equity deals in the Financial Services sector during the month of July. The number of deal transactions decreased 1.9% when compared to June's deal count. There was a 30.7% decline in the number of Financial Services deals compared to July 2025.



Financial Services Deals for July 2026

Company Name	Description	Deal Synopsis
Advice Insurance Agency	Provider of insurance brokerage services intended for individuals and businesses in California. The company offers auto, homeowners, commercial liability, renters, and motorcycle insurance, as well as registration renewal services, enabling clients to secure financial protection and manage vehicle administrative requirements through a remote-first platform.	
Affordable Medicare Solutions	Provider of insurance brokerage services intended to assist individuals with Medicare and health insurance selection. The company offers personalized consultations and policy evaluations across major carriers, enabling older adults and families to compare Medicare, dental, and vision plans to secure coverage that fits their medical needs and budget.	
AmeriTrust Group	Provider of insurance underwriting and administration services for independent agencies, governmental entities, professional associations and affinity partners. The company offers a range of specialty as well as property and casualty insurance programs and products on both an admitted and non-admitted basis including workers' compensation, commercial package and automotive business coverages along with claims and loss control services.	
Berger Financial Group	Provider of wealth management services intended to serve individuals and families. The company's technology utilizes modern portfolio theory and stop-loss strategies to manage portfolios, enabling clients to optimize tax outcomes and achieve long-term financial stability.	
Blue Lion Insurance Brokers	Provider of insurance brokerage and advisory services intended to protect business and personal assets. The company offers commercial, personal, and specialized franchise insurance, enabling business owners and families to secure tailored coverage and manage risks through a consultative process that leverages partnerships with over 30 national carriers.	

Company Name	Description	Deal Synopsis
Blue Sky Insurance Agency	Provider of insurance brokerage services intended to offer comprehensive commercial and personal lines of coverage. The company offers commercial insurance, personal insurance, home insurance, auto insurance, business insurance, and apartment building coverage, enabling individuals and businesses to obtain customized property and casualty protection through a network of preferred carriers.	
Bluechip Financial Advisors	Provider of financial advisory services intended to support long-term financial well-being through financial planning and investment guidance. The company offers wealth management, financial planning, tax advisory support, retirement planning, insurance guidance, and employee benefits expertise, enabling individuals, corporate executives, and business owners to make informed financial decisions and strengthen long-term financial security.	
Cordant Wealth Partners	Provider of wealth management services intended to help tech employees maximize equity compensation. The company specializes in tech industry compensation, including restricted stock units, employee stock purchase plans, deferred compensation, mega-backdoor Roth strategies, and equity diversification, enabling tech industry employees to maximize their equity compensation and achieve financial independence.	
Credit Mountain	Developer of a personalized credit platform intended to help people access and maintain their ratings. The company's platform provides a credit counselor for financial institutions and offers a credit booster, identifying which accounts to pay off first, then automatically making extra payments to pay off debt faster, enabling customers to easily add positive payment history to their credit report and reduce debt.	
CWS Financial Advisors	Provider of wealth management services intended to assist affluent households with financial goals. The company offers wealth management, financial planning, investment management, estate planning, tax optimization, and financial seminars, enabling affluent households and business owners to receive tailored investment strategies and principal-led guidance for generational wealth transfers.	
Doyle and Loughman Wealth Management Group	Provider of wealth management services intended to help individuals and families achieve financial goals. The company offers financial planning, retirement planning, investment management, estate planning, tax planning, and insurance planning, providing clients with personalized strategies to manage assets and prepare for future transitions.	

Company Name	Description	Deal Synopsis
Eaton Financial Group	Provider of financial planning services intended to help clients pursue personal goals. The company offers financial planning, investment management, retirement planning, 403(b) plan assistance, pension guidance, and beneficiary designation, providing individuals and families with wealth management advice to navigate complex transitions.	
FFR Wealth Team	Provider of wealth management services intended to connect money with life. The company offers wealth management, financial planning, investment management, retirement planning, estate planning, and tax planning, providing individuals and families with personalized strategies to achieve financial goals and maintain independence.	
First Choice Insurance Partners	Operator of an insurance agency intended to protect individuals, families, and businesses through personalized insurance coverage. The company offers personal, commercial, life, and health insurance policies with tailored guidance and proactive policy support, enabling homeowners, vehicle owners, businesses, and employers to secure appropriate coverage with confidence and ease.	
Greenscape Land Design	Provider of landscaping services intended for retail, hospitality, HOAs, commercial and corporate clients and public sectors. The company offers services, including landscape enhancements, snow and ice management, commercial tree care, irrigation and water management, landscape development and maintenance, thereby helping clients to maintain their properties for a long period of time by offering personalized and comprehensive services.	
IN Title	Provider of a title and real estate transaction service intended to facilitate residential and commercial property transfers. The company offers title searches, property record indexing, title insurance support, and transaction processing, enabling property buyers, sellers, lenders, and real estate professionals to complete property transactions with accuracy and confidence.	
Intermarket Insurance Agency	Provider of insurance brokerage services intended to offer coverage and risk management. The company offers professional liability insurance, general liability insurance, workers' compensation, commercial auto insurance, homeowners insurance, and umbrella liability, enabling clients to access multiple insurance carrier options and specialized professional liability programs.	

Company Name	Description	Deal Synopsis
InVista Advisors	Provider of financial advisory and wealth management services intended to serve high-net-worth individuals and families. The company offers investment management, financial planning, and estate planning, enabling clients to preserve and grow wealth through fee-only fiduciary guidance and integrated tax and retirement solutions.	
Ironclad Strategies	Provider of investment management and financial planning services intended to serve individuals and families. The company offers fiduciary-driven asset management, advanced financial planning, and family office services, enabling clients to access institutional-grade investment infrastructure and transparent financial guidance through a disciplined and independent advisory approach.	
Jackson-Lloyd Insurance Management	Provider of insurance underwriting and risk management services intended to serve employers in the Texas non-subscriber and Kansas exempt workers' compensation markets. The company specializes in alternative workers' compensation plans, risk management programs, claims management, underwriting services, safety and loss prevention services, and other services, thereby enabling employers to reduce workplace injury costs, manage risk, and improve employee protection.	
Kapitus	Provider of business financing services intended to support small and medium-sized enterprises. The company operates as both a direct lender and a marketplace, utilizing a proprietary comparison tool to return multiple competing offers from a network of lending partners, enabling small businesses to receive multiple financing offers through a single application process.	
LeafHouse Financial Advisors	Developer and provider of investment technology and fiduciary services intended to support retirement plan management. The company offers automated personalized portfolios, proprietary investment grading algorithms, and enterprise-level platforms, enabling financial advisors, plan sponsors, and recordkeepers to manage investments efficiently and improve decision-making.	
LG Insurance Agency	Provider of insurance brokerage services intended to protect personal and commercial assets. The company operates a private risk department for high-net-worth portfolios and provides homeowners, auto, business liability, employee benefits, life, and recreational vehicle coverage, enabling individuals and businesses to mitigate financial risks through customized protection plans.	

Company Name	Description	Deal Synopsis
Lovell Insurance Group	Provider of insurance services intended to serve middle-market commercial businesses. The company offers property and casualty insurance for the construction, hospitality, commercial real estate, and professional services sectors, thereby protecting the physical and financial assets of businesses with integrity, responsiveness, and boutique-level service backed by national resources.	
Miramar Capital	Provider of investment advisory services intended to serve high-net-worth individuals and institutional clients. The company offers equity investment management, fixed income strategies, alternative investment management, financial planning, and wealth management advisory services, featuring a dividend growth investment philosophy, fiduciary management framework, discretionary portfolio construction, fundamental research, and risk tolerance assessment to achieve long-term financial goals.	
Molpus Woodlands Group	Provider of timberland investment and land resource services intended to support investors in managing forest-based assets. The company offers acquisition, management, and harvesting of timberland as investment vehicles; timberland investment services; land management; marketing and harvesting operations; real estate and renewable resource services; strategic planning and information systems; legal and accounting services; sustainability and ESG-related services; and land sales and leasing, thereby enabling clients to maximize long-term value from timberland assets while ensuring sustainable resource management and optimized financial returns.	
NFP Insurance Solutions	Provider of insurance structuring services intended for high-net-worth individuals. The company offers private placement life insurance, private placement annuities, traditional life insurance, business continuation insurance, corporate-owned life insurance and insurance implementation, enabling affluent clients to achieve tax-efficient wealth preservation and legacy planning.	
Parkway Bank	Provider of banking services intended to deliver financial alternatives and strategies tailored to customers' unique needs. The company offers commercial banking services, including business and personal loans, land trusts, merchant loans, and treasury management solutions, enabling users to make better financial decisions.	The company was acquired by Patriot Financial Partners through a $379.42 million LBO on July 15, 2026. Initially $40.5 million of the total amount was raised in the form of convertible debt which was subsequently converted to equity.

Company Name	Description	Deal Synopsis
Perfect Power	Operator of renewable energy generation and battery storage assets designed to support the transition to a low-carbon electric grid. The company offers battery energy storage systems, utility-scale photovoltaics, and microgrid projects, providing utilities and energy markets with asset development, grid interconnection, and power market participation, enabling businesses to integrate renewable energy and enhance grid reliability.	
Pinnacle Wealth Management (California)	Provider of wealth management services intended to help individuals and families pursue financial goals. The company offers financial planning, wealth management, retirement planning, investment strategy, family budgeting, and insurance consulting, providing personalized guidance to individuals and families, enabling them to define and pursue financial goals with confidence.	
Progress Brokerage Group	Provider of insurance brokerage services intended to serve the hospitality sector. The company offers specialized commercial coverage for bars, restaurants, and taverns, enabling hospitality operators throughout Pennsylvania and neighboring markets to manage liability and property risks through relationship-driven brokerage with deep industry expertise.	
Resource Financial Group	Provider of wealth management services intended to help clients make financial decisions. The company offers financial planning, tax planning, investment solutions, succession planning, transition planning, and due diligence, enabling business owners and families to align their wealth with personal goals.	
Retirement Health Solutions	Provider of health insurance brokerage services intended for individuals and families. The company offers health insurance, Medicare supplement plans, Medicare planning, retiree health insurance, employee benefits, and policy consultations, enabling individuals and families to access tailored coverage options and receive annual policy reviews for optimal benefits.	
Retirement Solution Group	Provider of retirement plan consulting services intended to help employers establish and manage workplace retirement programs. The company offers retirement plan consulting, plan design, fiduciary support, compliance services, third-party administration, and participant education, enabling small and mid-sized businesses to strengthen retirement plan management and improve employee financial well-being.	

Company Name	Description	Deal Synopsis
Reunion Health Services	Operator of a full-service managing general underwriter (MGU) company intended for employer stop-loss products for self-funded employee benefit plans. The company markets, underwrites and binds coverage, issues and administers policies, collects premiums and makes claim payments on behalf of its carrier partners, ensuring companies searching for self-insured options have cost-effective and creative services.	
Rosenthal Wealth Management Group	Provider of financial planning and wealth management services intended to help clients achieve their aspirations. The company offers retirement planning, wealth management, estate planning, legacy planning, and impact investing, enabling individuals, families, and business owners to preserve their legacies and navigate their financial journeys with confidence.	
Select Medical Holdings	Select Medical Holdings Corp is a healthcare company that operates through three segments: critical illness recovery hospitals, rehabilitation hospitals, and outpatient rehabilitation clinics. Critical illness recovery hospitals which derives maximum revenue consists of hospitals designed to serve the needs of patients recovering from critical illnesses, often with complex medical needs. The rehabilitation hospital segment consists of hospitals designed to serve patients that require intensive physical rehabilitation care. Patients are typically admitted to critical illness recovery hospitals and rehabilitation hospitals from general acute care hospitals. The outpatient rehabilitation segment consists of clinics that provide physical, occupational, and speech rehabilitation services.	The company was acquired by Welsh, Carson, Anderson & Stowe, Mr. Robert Ortenzio and Mr. Martin Jackson through a $4.9 billion public-to-private LBO on July 1, 2026. The transaction was supported by $1 billion of debt financing.
Send (Software)	Developer of a commercial insurance underwriting and policy management software platform designed to help insurers, MGAs, and reinsurers build, distribute, and manage digital insurance products. The company's platform offers configurable underwriting workflows, rating and policy administration capabilities, no-code product design tools, real-time data ingestion, and API-based integrations, enabling commercial insurance carriers and intermediaries to launch products faster, automate complex underwriting, streamline operations, and improve pricing and portfolio performance.	
Seneca House Advisors	Provider of wealth management and investment advisory services intended to help individuals and families manage, preserve, and plan their financial assets. The company offers portfolio management, financial planning, risk management, and investment oversight, enabling individuals and families to navigate financial decisions and support long-term wealth stewardship.	

Company Name	Description	Deal Synopsis
Shipley & Pease Insurance	Provider of insurance brokerage services intended to protect businesses and individuals from financial loss. The company offers professional liability, commercial, business interruption, homeowners, auto, and life insurance, enabling architects and engineers to mitigate operational risks through tailored coverage and risk management advisory.	
Situational Awareness (Public Equity Portfolio in California)	A public holding equity portfolio based in California, United States. The portfolio was financed through prime brokerage leverage.	The stock portfolio of Situational Awareness was acquired by Citadel Enterprise Americas, through an estimated $16 billion LBO on July 30, 2026.
Stonebriar Insurance Group	Provider of insurance brokerage services intended to offer personalized coverage for individuals and businesses. The company offers policy customization, market comparison, and claims assistance across home, auto, and commercial lines, enabling clients to access multiple carrier options and secure insurance plans tailored to their specific risk profiles and budgets.	
Stride Health	Operator of an insurance recommendation platform intended to offer health insurance services. The company's platform provides access to affordable health, vision, and dental benefits and tax deduction support, enabling users to access benefits with guidance and a suite of insurance products.	
The Finway Group	Provider of retirement plan services intended to simplify employer-sponsored retirement plan administration. The company offers pooled employer plans, third-party administration, fiduciary oversight, and flexible plan management services, enabling employers to administer retirement plans with greater efficiency and regulatory compliance.	
The Spectrum Companies	Provider of real estate services intended to create and manage commercial and residential properties. The company offers real estate development, property management, commercial leasing, capital management, and asset management, providing commercial property owners with professional oversight to maintain and lease office and multifamily assets.	
Towson Wealth Management	Provider of wealth management services intended to serve individuals and families. The company's technology utilizes cutting-edge tools and advanced technology to provide holistic financial planning, enabling clients to navigate financial transitions and achieve long-term goals.	

Company Name	Description	Deal Synopsis
Transcend Capital Advisors	Provider of wealth management services intended for high-net-worth individuals and institutions. The company offers public and private investments, strategic advisory, banking access, lending solutions, and family office services, enabling clients to access institutional-grade alternative assets and personalized financial planning through an unconstrained endowment-style approach.	
Trippon Wealth Management Group	Provider of wealth management services intended to help clients attain financial goals. The company offers investment management, tax planning, financial planning, retirement income planning, estate planning, and pension consulting, enabling high-net-worth families and professionals to align portfolio management with proactive tax strategies.	
Venturi Private Wealth	Provider of wealth management services to entrepreneurs, corporate executives, and wealthy families. The company offers investment management, concentrated stock management, banking and lending, estate planning and trust services, and comprehensive tax management, enabling clients to manage the financial life of their organizations.	
Virtue Risk Partners	Provider of specialty underwriting services intended to offer customized risk management and insurance solutions. The company offers direct technical underwriting, blueprint analysis, soil core sample review, risk assessment, regulatory compliance monitoring, and direct submission processing, enabling wholesale agents to provide specialized liability protection for contractors and engineers managing environmental and structural hazards.	
Xorkets FX	Developer of a digital financial trading platform designed for global investment activities. The company's platform utilizes artificial intelligence and big data analysis to provide real-time market forecasts and trade execution across foreign exchange, digital currencies, and stock indices, enabling individual and institutional clients to manage diversified investment portfolios through a high-performance infrastructure.	The company was acquired by Grupo Cibest, Banco de Chile, The Goldman Sachs Group and JP Morgan Asset Management through an estimated $2.26 billion LBO on July 27, 2026.
Zephyr Associates	Developer of investment analytics intended to support financial advisors, asset managers, and investment professionals. The company offers portfolio analysis software, performance and risk analysis, asset allocation analysis, style attribution, manager research, reporting tools, financial databases, and portfolio analytics, thereby helping clients evaluate investment portfolios and support investment decision-making.	