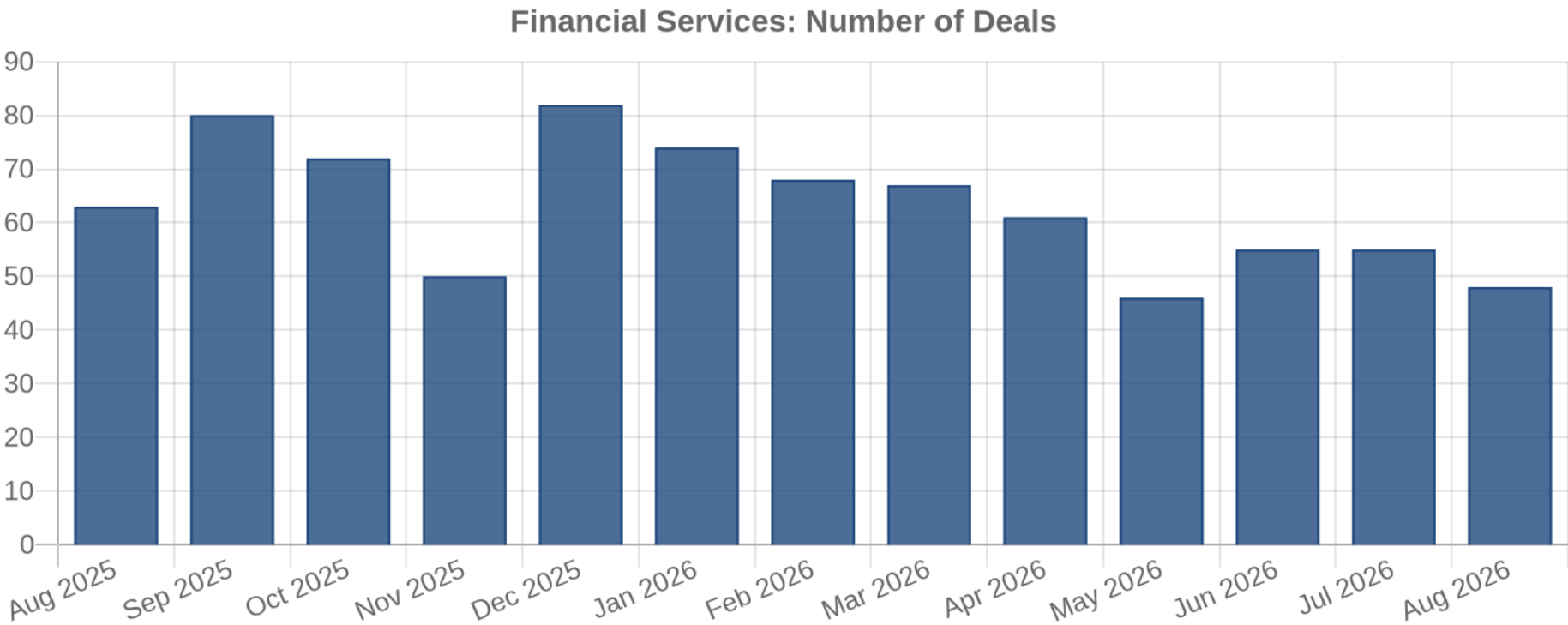


Financial Services Deals for August 2026

There were 48 completed U.S. private equity deals in the Financial Services sector during the month of August. The number of deal transactions decreased 12.7% when compared to July's deal count. There was a 23.8% decline in the number of Financial Services deals compared to August 2025.



Financial Services Deals for August 2026

Company Name	Description	Deal Synopsis
360 Benefits	Provider of employee benefits consulting services intended for businesses. The company offers employee benefits consulting, insurance brokerage services, compliance services, retirement plan management, executive compensation design, and wealth management advisory services, enabling employers to implement strategies to manage increasing healthcare expenditures.	
All Risk Insurance Group	Provider of insurance brokerage services intended for personal and commercial asset protection. The company offers homeowners insurance, auto insurance, general liability insurance, commercial property insurance, workers' compensation insurance, and marine insurance, enabling clients to secure coverage for diverse assets and reduce costs through policy bundling.	
All Star Financial	Provider of wealth management services intended to offer integrated financial and tax strategies. The company offers investment management, tax planning, retirement planning, estate planning, risk management and charitable giving, enabling high-net-worth individuals and families to build and protect wealth through coordinated advisory services.	
AmericanTCS	Operator of a financial services company intended to provide retirement plan solutions. The company offers retirement, wealth, and technology solutions to improve retirement outcomes for participants and provide fiduciary excellence for clients, enabling customers to gain operational efficiencies for their businesses while benefiting from a strong emphasis on personal customer service.	
Arbor Capital Management (Alaska)	Provider of fiduciary wealth management and financial planning services intended for individuals, business owners, retirees, and institutional clients. The company offers customized portfolio management, retirement planning, trust and estate planning, tax strategy, digital asset SMAs, and ESG investment strategies, enabling clients to navigate complex financial needs and secure long-term financial growth.	
ArtesRx	Operator of pharmacy businesses intended to serve complex patient populations. The company is engaged in acquiring, scaling and support to pharmacy businesses across the country to build a national patient-focused platform that differentiates based on clinical and customer service.	

Company Name	Description	Deal Synopsis
Arthur Stein Financial	Provider of financial planning services intended to assist federal employees and retirees with retirement and investment management. The company offers personalized financial planning, portfolio management, retirement guidance, and wealth preservation expertise, enabling retirees, pre-retirees, and federal employees to strengthen long-term financial security and make confident investment choices.	
Asset Living	Operator of a third-party property management firm intended to foster thriving communities nationwide. The company's residential property management platform services include property management, asset management, receivership, and investment services, with a multitude of properties across the country in the multifamily, single-family home rentals, affordable housing, build-to-rent, active adult, and student housing divisions, helping clients explore new horizons, grow their capabilities, and turn challenges into opportunities.	The company was acquired by New Mountain Capital, Alberta Investment Management and Mr. Ryan McGrath through an LBO for an estimated \$2 billion in August 2026.
Aviza Insurance Agency	Provider of personal and commercial insurance brokerage services intended to protect client assets. The company offers home, auto, life, and business insurance, enabling individuals and commercial enterprises to mitigate financial risk through personalized coverage plans and expert policy management.	
BC Partners	Operator of an alternative investment firm intended to scale businesses into global leaders. The company utilizes integrated transatlantic investment teams, sector expertise, local networks, operational resources, and opportunistic capital allocation, providing institutional investors and management teams with private equity, private credit, and real estate services to facilitate business transformation and capital growth.	
Bell Financial Services (Asset Management)	Provider of wealth management and financial planning services intended to serve individuals, families, and business owners. The company utilizes cutting-edge tools and advanced technology, employs a holistic approach to financial planning, and provides personalized investment guidance, enabling clients to achieve long-term financial objectives through personalized investment strategies and comprehensive wealth management.	

Company Name	Description	Deal Synopsis
Charles G. Harris Insurance Agency	Provider of insurance brokerage services intended to offer personal and commercial coverage options. The company offers home, auto, umbrella, motorcycle, RV, and boat insurance from multiple carriers, enabling individual policyholders and families to secure customized protection and access national market resources through a locally established agency.	
Chelf Insurance Group	Provider of insurance brokerage services intended to offer financial protection and risk mitigation. The company utilizes advanced agency management systems and a national platform to deliver localized insurance services, enabling individuals and businesses to secure employee benefits, property and casualty insurance, home insurance, auto insurance, commercial insurance, and workers' compensation coverage.	
Cloud Investments	Provider of financial advisory services intended to help individuals achieve retirement goals. The company offers retirement planning, insurance services, tax management, social security maximization, wealth preservation and estate planning, enabling clients in the pre-retirement and retirement communities to secure long-term financial success and independence.	
Denver Private Wealth Management	Provider of wealth management services intended to help professionals and families achieve long-term financial goals. The company utilizes a six-step planning process, active portfolio oversight, asset allocation, rebalancing, risk management, and tax-loss harvesting, enabling clients to align financial resources with specific life objectives and reduce tax liability through integrated planning and harvesting strategies.	
Dickerson Jackson & Associates	Provider of wealth management services intended to help clients navigate complex financial decisions. The company utilizes a proprietary four-step process to manage client wealth and provide personalized financial guidance, providing individuals and families with the ability to navigate complex financial decisions and pursue long-term goals through an integrated wealth management process.	
Engage Fi	Provider of data-informed consulting services intended to serve credit unions and community banks. The company offers core banking advisory, payments consulting, and digital banking strategy along with vendor negotiation and technology assessment services, enabling financial institutions to optimize operational efficiency and maximize savings on technology contracts.	

Company Name	Description	Deal Synopsis
Ever.Ag (Risk Management Business in the United States)	Provider of risk management services intended to help agricultural businesses navigate commodity market volatility. The company offers risk management services, commodity brokerage, advisory services, insurance services, market research, risk management software, enabling agricultural producers, processors, and cooperatives to manage commodity risk through integrated technology and market intelligence.	
GblNexus	Provider of a crypto-to-crypto payment gateway intended to enable businesses to accept and process digital asset transactions through blockchain-based settlement systems. The company offers crypto-to-crypto payment gateway technology, streamlined transaction processing, and digital asset settlement capabilities, enabling merchants, financial service providers, and enterprises to conduct secure and efficient cryptocurrency-based payments across global markets.	The company was acquired by VP Fintech Group through an estimated GBP 10 million LBO on August 14, 2026.
Hocker Family Insurance	Provider of personal and commercial insurance services intended to protect individuals and businesses. The company offers auto, home, life, and business insurance through an independent agency model representing multiple carriers, enabling clients to access tailored coverage plans and professional risk management services.	
Hometown Insurance Center	Provider of insurance brokerage services intended to help clients find policies at competitive prices. The company offers auto insurance, home insurance, life insurance, health insurance, commercial insurance, and logging insurance, providing individuals and businesses with financial protection and risk management.	
JTC Group	JTC PLC is a company based in Jersey that provides fund, corporate, and private client services. The company has two main segments: Institutional Client Services (ICS) and Private Client Services (PCS). The ICS segment generates the highest revenue. JTC PLC offers company secretarial and administration services to various corporate clients, including small and medium-sized enterprises, public companies, multinationals, sovereign wealth funds, family offices, and private clients. The company also provides services in real estate, private equity, hedge, renewables, debt, and other alternatives, including sovereign wealth funds.	The company was acquired by Permira and CPP Investments through a GBP 3.8 billion public-to-private LBO on August 20, 2026. The transaction was supported by \$1.5 billion of debt financing.

Company Name	Description	Deal Synopsis
Kamal Capital Group	Operator of a real estate investment firm intended to generate returns through strategic property acquisitions and asset management. The company focuses on value-add investment strategies and portfolio optimization, enabling investors and partners to access diversified real estate opportunities through structured deal sourcing, due diligence and asset management solutions.	
Lendr (Financial Software)	Developer of loan management software designed for private and hard money lenders to automate origination and servicing. The company offers document automation, loan management, investor tracking, and servicing capabilities, enabling private lenders to manage lending activities efficiently and maintain accurate operational oversight.	
LimitFi	Provider of credit management services intended to connect banks and lenders with the insurance ecosystem. The company offers credit management and risk transfer services by sourcing and underwriting credit exposure, providing banks and lenders with insurance protection for capital relief and risk reduction.	
M Group Investment Advisor	Provider of wealth management services intended to help clients achieve investment goals. The company offers wealth management, investment strategies, portfolio management, and financial consultations, enabling clients to navigate their financial journey with confidence.	
Marathon Wealth Management (Asset Management)	Provider of financial life planning services intended to help individuals achieve financial independence. The company offers financial life planning, wealth management, individual portfolio management, pension consulting, advisor selection, and fund manager selection, enabling individuals to align their personal life goals with long-term wealth management strategies for improved financial well-being.	
Midwest Insurance Agency	Provider of commercial insurance brokerage services intended to serve businesses and owner-operators. The company operates as a full-service commercial brokerage specializing in transportation and logistics niche markets, provides dedicated claims management and administrative support, and implements loss control strategies, enabling clients to secure specialized coverage for semi-trucks, tractors, and trailers through niche market expertise.	

Company Name	Description	Deal Synopsis
Mobile Bay Financial Services	Provider of retirement planning and wealth management services intended for retirement lifestyle fulfillment and financial security. The company offers retirement planning, wealth management, financial advisory, investment strategies, protection products and legacy planning, providing families with personalized financial blueprints and a proprietary process to help them build and protect their wealth.	
NEOS Investments	Provider of investment management services intended to deliver monthly income through options-based strategies. The company combines quantitative methods with volatility and risk management, helping investors manage tax implications and improve outcomes through data-driven strategies.	The company was acquired by The Goldman Sachs Group through a \$2.25 billion LBO on August 17, 2026. The company will receive a contingent payout, which could reach \$2.25 billion in cash and stock, contingent upon the fulfillment of certain performance and/or service commitments.
Norton & Siegel	Provider of insurance brokerage services intended to offer personal and commercial coverage to residents and businesses. The company represents multiple insurance carriers to compare coverage and rates, provides same-day flood policy placement for home closings, and specializes in coverage for waterfront homes, enabling clients to secure insurance for high-risk properties such as waterfront homes using specialized market access.	
OptionMetrics	Developer of historical options data and analytics products platform designed for institutional investors, risk managers, and academic researchers. The company offers products to construct and test investment strategies, perform empirical research, and assess risk, enabling portfolio managers, traders, and quantitative researchers to make informed, improved, and profitable investment decisions.	
Park Bridge Financial	Provider of loan surveillance and consulting services intended for the commercial mortgage lending industry. The company offers portfolio valuations, risk assessments, and litigation support, enabling commercial real estate lenders and investors to optimize loan performance and manage securitized debt through conflict-free surveillance and advisory services.	
Radwick & Lightle	Provider of employee benefit services intended to simplify benefits management and optimize plan designs for businesses. The company offers benefits strategy, plan design, and hr advisory services, providing portal implementation and administrative support for small and mid-sized businesses.	

Company Name	Description	Deal Synopsis
Renew International	Provider of cost recovery and cost containment services intended to uncover financial value for enterprise organizations. The company offers contract compliance, supplier payment review, and performance improvement services, enabling clients in the energy and utility sectors to recover overbilled amounts and uncollected credits through proprietary automation software, gainIQ analytics, and a technology-enabled delivery model.	
Sachetta	Provider of wealth and tax advisory services intended for long-range financial planning. The company offers financial planning, investment management, tax planning, risk management, business services and ascend program, providing individuals with coordinated recommendations to help them make smart and fully-informed decisions regarding their financial future.	
Servo Wealth Management	Provider of financial advisory services intended to serve individuals and families. The company specializes in financial and retirement planning, investment management, ongoing advice and guidance, portfolio management and investment portfolio rebalancing, thereby helping clients manage their investments and work toward retirement, income and legacy goals.	
Sherwood Partners	Provider of restructuring advisory services intended to assist businesses during financial transitions. The company offers assignments for the benefit of creditors, receiverships, liquidating trust oversight, Article 9 foreclosures, managed liquidations, and intellectual property monetization, enabling organizations in the technology and finance sectors to manage asset recovery and stabilize operations during periods of instability.	
Simplicity Wealth Advisors	Provider of financial planning services intended to support professionals and business owners. The company utilizes a holistic planning approach that combines investment and insurance strategies, leveraging an institutional-level wealth management platform and advanced risk management technologies, providing income planning, investment planning, tax planning, long-term care planning, healthcare planning, and legacy planning to achieve long-term wealth goals.	

Company Name	Description	Deal Synopsis
Socha Financial Group	Provider of financial planning and investment management services intended for individuals and families. The company specializes in retirement planning, fiduciary investment management, and tax preparation, thereby helping clients manage financial matters and plan for retirement, investments, and taxes.	
Steeplechase Advisors	Provider of turnaround and restructuring advisory services intended to support middle market businesses during financial transitions. The company offers turnaround consulting, restructuring advisory, transaction advisory, interim management, liquidity analysis, and litigation support, enabling stakeholders and middle market companies to navigate complex reorganizations, execute operational turnarounds, and manage distressed financial situations both inside and outside of court processes.	
Tegeler & Associates	Provider of insurance services intended to protect businesses, individuals, and families. The company represents multiple top-rated carriers to offer personal insurance, business insurance, and employee benefits, enabling clients to access tailored coverage options for diverse risks, including agricultural operations, commercial liability, and property protection, through a network of local offices.	
Two Harbors Investment	Two Harbors Investment Corp is a real estate investment trust focused on investing in, financing, and managing residential mortgage-backed securities, residential mortgage loans, mortgage servicing rights, and commercial real estate. The majority of its investment portfolio is split between agency RMBS purchased from government-sponsored enterprises and nonagency RMBS. The company derives revenues mainly from its MSR and Agency RMBS portfolio, including servicing fee income, float income, and interest income, as well as mortgage loan origination activities established to support the MSR portfolio. Its investment portfolio is subject to market risks, mainly interest rate, basis, and prepayment risk. The majority of income is generated by available-for-sale securities.	
Two West Advisors	Provider of financial advisory services intended to assist with employer-sponsored retirement plans and financial planning. The company offers retirement plan consulting and financial planning services through an independent advisory model, utilizing modern portfolio theory, discretionary portfolio management, and investment policy monitoring, and providing pension and profit-sharing plans with a framework to manage assets and improve retirement readiness.	

Company Name	Description	Deal Synopsis
Universal Component Lender Services	Provider of default loan servicing and resolution services intended for banks, credit unions, and mortgage bankers. The company offers examiner-ready component servicing, end-to-end default management, loss mitigation, bankruptcy administration, and foreclosure management, enabling financial institutions to manage non-performing assets and maintain regulatory compliance through specialized loan resolution processes.	
Visionary (Insurance Brokers)	Provider of financial services intended to bring financial literacy to families. The company offers life insurance, annuities, financial literacy education, agent career opportunities, wealth management, and health insurance, providing individuals and families with access to financial education and protection products to drive generational change.	
Weinand Financial	Provider of financial planning services intended to ensure a secure financial future for individuals and businesses. The company offers portfolio management, pension consulting, retirement plan design, life insurance, disability coverage, and long-term care insurance, enabling high-net-worth individuals and families to develop personalized wealth strategies and manage investment allocations through managed public funds.	
Wright Wealth Group	Provider of liability and associated risks insurance broking services intended to serve the construction, engineering, and manufacturing sectors. The company operates as a specialist liability broker with a dedicated underwriting arm for online risk solutions, develops exclusive insurance products tailor-made for specific trades and high-risk activities, and provides enhanced cover options, enabling clients to secure specialized liability protection through insurance products designed for specific trade activities and industrial risks.	