

## Financial Services Deals for January 2020

Company Name	Description	Deal Synopsis
Academic Healthplans	Provider of student health insurance plan administration services for colleges and universities. The company offers comprehensive health solutions made specifically for students including student medical insurance, individual coverage options, plan enhancements, and other related solutions.	The company was acquired by Risk Strategies Company, via its financial sponsors, HarbourVest Partners and Kelso Private Equity, through an LBO on January 14, 2020 for an undisclosed sum. This acquisition establishes the firm as the nation's largest broker of student health insurance plans and related administrative services.
Alltran Financial Services	Provider of financial services to the accounts receivable management industry. The company assists clients in managing their accounts receivables and contact centers using customized strategies and best-in-class technology systems in order to provide greater service to their customers that are specifically aligned with their goals.	The company, a subsidiary of Altran, was acquired by Transworld Systems, via its financial sponsor Platinum Equity, through an LBO on January 21, 2020 for an undisclosed sum.
Altus Power America	Provider of investment in clean energy projects and renewable energy certificates. The company deploys capital to build, own and operate clean energy systems on commercial buildings and properties, schools and municipal buildings. It also invests in trades and structures portfolios of renewable energy certificates and other renewable attributes.	The company received \$850 million of development capital from The Blackstone Group and GSO Capital Partners on January 14, 2020. As a result of the transaction, the company was recapitalized. The funding will enable the company to have sufficient capital to grow its portfolio to over \$1 billion of commercial and industrial solar assets. The company secured a construction-to-term loan facility from a syndicate of commercial banks.
BR Vital Brokerage	Operator of independent insurance brokerage service company. The company offers property and casualty insurance with a specialty in providing liability coverage to medical professionals.	The company was acquired by The Hilb Group, via its financial sponsor The Carlyle Group, through an LBO on January 1, 2020 for an undisclosed sum.
Briargate Insurance Services	Provider of insurance services based in Chicago Heights, United States. The company's services include employee benefits, personal and commercial insurance, which includes life insurance, home, property, and group health insurance services.	The company was acquired by Hub International (United States), via its financial sponsors Alpinvest Partners, Atlas Partners, HarbourVest Partners, and Hellman & Friedman, through an LBO on January 8, 2020 for an undisclosed sum.
First Ohio Planning	Provider of asset management services based in Columbus, United States. The company's services include investment management, financial management and business programs to its clients.	The company was acquired by Mercer Advisors, via its financial sponsors Genstar Capital and Mercer Advisors, through an LBO on January 28, 2020 for an undisclosed sum.

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Fitness Holdings North America	Operator of fitness franchise holding company based in Greenwich, Connecticut. The company runs & fitness centers gyms across the northeastern United States.	The company received an undisclosed amount of development capital from E2 Venture Partners and Seacoast Capital on January 29, 2020. As a result of the transaction, the company was recapitalized. The funds will primarily be utilized to accelerate the Company's growth, both through new units and acquisitions, throughout the Northeast corridor.
Group Brokerage Insurance Agency	Provider of insurance brokerage services. The company's offerings include employee benefits analysis and consultation, health insurance plans, dental insurance plans, group life insurance plans and full-service investment and financial planning services.	The company, subsidiary of Fidelity National Financial was acquired by The Hilb Group, via its financial sponsor The Carlyle Group, through an LBO on January 1, 2020 for an undisclosed sum.
GRS Title Services	Provider of title insurance agency services based in Richmond, United States. The company offers services including Commercial Title Insurance, Escrow Services, Title Searches, Closing Services, and 1031 Exchange Services to its clients.	The company a subsidiary of Global Services Connection was acquired by Kensington Vanguard National Land Services, via its financial sponsors Stone Point Capital and Red Oak Partners, through an LBO on January 6, 2020 for an undisclosed sum.
Martens-Johnson Insurance Agency	Provider of insurance products headquartered in Rockville, United States. The company offers personal and commercial insurance including auto, property, health, life and general insurance services to its customers.	The company was acquired by The Hilb Group, via its financial sponsor The Carlyle Group, through an LBO on January 1, 2020 for an undisclosed sum.
Safe-Guard Products International	Provider of after-market warranty products and services for new, used and leased motor vehicles. The company's products and services protect consumers from the financial risks of owning an automobile, recreational vehicle, boat or motorcycle while enhancing the consumer's ownership experience. It also designs, markets and administers its products and services and sells them through a national network of independent agents who market to auto dealerships, vehicle leasing and financing companies, and other service contract producers.	The company was acquired by Stone Point Capital through an LBO on January 27, 2020 for an undisclosed sum.

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Stephens-Matthews Marketing	Provider of insurance products and services. The company offers a full range of health insurance solutions, including major, short term, Medicare supplement insurance and Medicare advantage insurance plans as a part of its broad suite of individual and group insurance products.	A majority interest in the company was acquired by AmeriLife Group, via its financial sponsor J.C. Flowers & Co., through an LBO on January 9, 2020 for an undisclosed sum. The acquisition will expand AmeriLife Groups distribution reach in meeting the needs of pre-retirees and retirees.
Taylor & Associates Benefits Services	Operator of an employee benefits brokerage firm based in Modesto, California. The company provides a suite of employee benefits products to clients in Northern California.	The company was acquired by Relation Insurance Services, via its financial sponsor Aquiline Capital Partners, through an LBO on January 7, 2020 for an undisclosed sum.
The Jordan Insurance Group	Provider of business and individual insurance services. The company provides employee benefits, voluntary benefits, benefits admin & payroll, executive benefit plans, estate tax strategies	The company was acquired by AssuredPartners, via its financial sponsor GTCR, through an LBO on January 10, 2020 for an undisclosed sum.