

Financial Services Deals for February 2020

Company Name	Description	Deal Synopsis
D. F. Dwyer & Associates	Provider of insurance services based in Newport, Rhode Island. The company provides property & casualty, automobile and event insurance to individuals as well as businesses.	The company was acquired by The Hilb Group, via its financial sponsor The Carlyle Group, through an LBO on February 1, 2020 for an undisclosed sum.
First Eagle Alternative Credit (NAS: TCRD)	THL Credit Inc is an externally managed, non-diversified closed-end management investment company. The firm is an alternative credit manager with an objective to generate both current income and capital appreciation, through investments in privately negotiated debt and equity securities of lower middle market companies. It primarily lends money to lower middle market companies that invest in directly-originated first lien and second lien secured loans, including through unitranche investments.	The company, a subsidiary of Thomas H. Lee Partners, was acquired by First Eagle Investment Management, via its financial sponsors Corsair Capital, Sofina, The Blackstone Group and Canada Pension Plan Investment Board, through a public-to-private LBO on February 3, 2020. The acquisition of THL Credit will expand the range of differentiated investment solutions First Eagle offers to institutional and retail investors worldwide while strengthening its partnerships with financial professionals as well as with borrowers, private equity sponsors and investment banks.
Green Street Advisors	Provider of real estate research and analysis services for commercial real estate investors. The company offers REIT (real estate investment trusts) IPO (initial public offering) advisory, REIT conversion, real estate monetization alternatives, portfolio valuation, transaction advisory, and cross-border advisory to provide unparalleled insight, advice, and service to knowledgeable investors looking to execute the best possible public and private real estate capital allocation decisions.	The company received an undisclosed amount of development capital from Welsh, Carson and Anderson & Stowe on February 6, 2020. The financing is intended to be used for acquisition of four publications for the commercial real estate and financial markets.
J.D. Mellberg Financial	Provider of annuity and retirement planning services based in Arizona, US. The company offers multi-media lead generation and appointment setting service which allows insurance agents and advisors to serve more clients with better solutions.	The company was acquired by AmeriLife Group, via its financial sponsor J.C. Flowers & Co., through an LBO on February 12, 2020 for an undisclosed sum.
Kokkoris Insurance Services	Operator of a boutique insurance agency based in Astoria, New York. The company offers general liability insurance, commercial auto insurance, excess liability insurance, employers liability insurance and commercial property insurance from a wide range of carriers to clients, especially in the construction, real estate and hospitality industries.	The company was acquired by Hub International (United States), via its financial sponsors Hellman & Friedman, AlInvest Partners, HarbourVest Partners and Altas Partners, through an LBO on February 5, 2020 for an undisclosed sum.

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Olde City Lending Solutions	Provider of appraisal management services. The company specializes in collateral management services for the residential mortgage industry.	The company was acquired by Nationwide Property & Appraisal Services, via its financial sponsor Corridor Capital, in partnership with founders, Joe Cudwadie and Bill Donahue, through an LBO on February 3, 2020 for an undisclosed sum.
Orgill Singer & Associates	Provider of personal insurance, insurance services, business insurance, and worker's compensation based in Las Vegas, Nevada. The company specializes in commercial insurance, employee benefits and personal risk solutions for local businesses and individuals.	The company was acquired by USI Insurance Services, via its financial sponsors Kohlberg Kravis Roberts and Caisse de dépôt et placement du Québec, through an LBO on February 10, 2020 for an undisclosed amount.
Pope & Young Bonding	Provider of a comprehensive suite of surety and bond products to clients across California. The company specializes in contract, license and permit, court, and fidelity bonds.	The company was acquired by Relation Insurance Services, via its financial sponsor Aquiline Capital Partners through an LBO on February 14, 2020 for an undisclosed sum. The acquisition continues to deepen Relation's specialty service offerings, broaden its national footprint, and continue its steady growth trajectory.
Regency Insurance Group (Florida)	Provider of insurance brokerage services based in Florida, US. The company offers home insurance, business insurance, life insurance which allows the customers to get fair policies along with personal line coverage and fair advice.	The company was acquired by The Hilb Group, via its financial sponsor The Carlyle Group, through an LBO on February 1, 2020 for an undisclosed sum.
Resources Investment Advisors	Provider of investment advisory services based in Overland Park, Kansas. The company provides retirement plan, wealth management, and portfolio management services.	The company was acquired by OneDigital Health and Benefits, via its financial sponsor New Mountain Capital, through an LBO on February 4, 2020 for an undisclosed sum.
Tegra118	Provider of investment advisory and management services. The company specializes in offering investment and wealth management services offering it to high net worth individuals and institutions.	The company was acquired by Motive Partners and Cannae Holdings through a \$775 million LBO on February 19, 2020. The transaction values the company at \$860 million. As part of the deal Fiserv received approximately \$510 million in net after-tax proceeds and retained a 40% equity interest in the business.

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Transport Risk Management	Provider of aviation insurance services. The company covers the basic risks and liability exposures of a client's core business, but every area of potential loss that pertains to a company's exposures arising from aviation, aerospace or aircraft operations and activities.	The company was acquired by Risk Strategies Company, via its financial sponsors HarbourVest Partners and Kelso Private Equity, through an LBO on February 4, 2020 for an undisclosed sum. The acquisition of Transport Risk also brings wholesale capabilities as the firm has managing general agent authority with a major international carrier for its specialty drone program.
Triester, Rossman and Associates	Provider of insurance solutions based in King Of Prussia, Pennsylvania. The company provides its clients with commercial and personal insurance including media liability, marine, management liability and automobile insurance. The company also provides employee and individual benefits.	The company was acquired by Hub International (United States), via its financial sponsors Alpinvest Partners, Altas Partners, HarbourVest Partners and Hellman & Friedman through an LBO on February 6, 2020 for an undisclosed sum.
UNIRISC	Provider of corporate relocation insurance products and services headquartered in Arlington, Virginia. The company provides global relocation insurance products, claims services, and bespoke relocation assistance via brokerage and TPA divisions to multinational employers, families, businesses and individuals before, during and after their move.	The company was acquired by Risk Strategies Company via its financial sponsors HarbourVest Partners and Kelso Private Equity through an LBO on February 18, 2020 for an undisclosed sum. The acquisition expands Risk Strategies' suite of offerings and will provide the company with significant cross-selling opportunities.
Uown Leasing	Operator of a lease-to-own company intended to provide an alternative to traditional credit. The company specializes in providing lease purchase programs to customers through select furniture and electronics retailers, providing them with a simple, straight-forward payment option on essentials.	The company was acquired by Mollie Financial, via its financial sponsor 777 Partners, through an LBO on February 19, 2020 for an undisclosed sum. Under the terms of the acquisition, Uown Leasing will combine operations with Mollie Financial and operate solely under the Uown Leasing.