

## Financial Services Deals for November 2020

| Company Name                      | Description  | Deal Synopsis  |
|-----------------------------------|--|--|
| Alliance Insurance Group (Kansas) | Provider of insurance services. The company offers property and casualty insurance products including homeowners, personal automobile, workers compensation and commercial package for customers.  | The company was acquired by World Insurance Associates, via its financial sponsor Charlesbank Capital Partners, through an LBO on November 1, 2020 for an undisclosed sum.                       |
| American Benefits Exchange        | Provider of insurance services to federal, postal and state employees, as well as members of the United States Armed Forces and small businesses. The company offers a portfolio of products to address financial issues, such as retirement planning, FEGLI Option B replacement, thrift savings plan rollovers and pension maximization. | The company was acquired by AmeriLife Group, via its financial sponsors Thomas H. Lee Partners, Cannae Holdings and Waterfield Group through an LBO on November 17, 2020 for an undisclosed sum. |
| Ball Insurance Services           | Provider of insurance brokerage services based in Merrillville, Indiana. The company offers insurance coverage for a range of products including automobiles, boats, recreational vehicles, trailers, residential and commercial properties, thereby committed to providing the clients with customized products at affordable prices.     | The company was acquired by World Insurance Associates, via its financial sponsor Charlesbank Capital Partners, through an LBO on November 1, 2020 for an undisclosed sum.                       |
| CBD Wealth Management             | Provider of financial advisory services. The company is engaged in providing services such as financial affairs of a select group of families and businesses across the Gulf Coast with a background in legal, banking and financial services industries.  | The company was acquired by Beacon Pointe Advisors, via its financial sponsor ABRY Partners, through an LBO on November 23, 2020 for an undisclosed sum.   |
| Collier O'Neill & Associates      | Operator of an insurance agency in Trenton, New Jersey. The company provides products like auto insurance, rental property insurance, flood insurance for individual customers and business products like general liability insurance, restaurant & bar insurance, business interruption insurance and more for commercial clients.        | The company was acquired by World Insurance Associates, via its financial sponsor Charlesbank Capital Partners, through an LBO on November 1, 2020 for an undisclosed sum.                       |

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| Danaher-Skewes & Associates            | Provider of insurance brokerage services based in Alexandria, Virginia. The company offers a range of insurance services including risk, injury, personal and commercial, residential, property, health, business and risk management, thereby helping the clients by delivering specialized coverage programs that are unique to each client.                               | The company was acquired by World Insurance Associates, via its financial sponsor Charlesbank Capital Partners, through an LBO on November 1, 2020 for an undisclosed sum.                       |
| Fairway Insurance Services             | Provider of insurance brokerage and risk management services. The company offers property and casualty, health and life, business and commercial assets insurance services across New Jersey, Pennsylvania, and Delaware.  | The company was acquired by World Insurance Associates, via its financial sponsor Charlesbank Capital Partners, through an LBO on November 1, 2020 for an undisclosed sum.                       |
| Flanagan Associates                    | Operator of a full-service insurance agency in North Haven, Connecticut. The company provides customized personal, commercial and life insurance products like auto insurance, workers compensation insurance, dental insurance and much more to its clients meeting their specific needs.   | The company was acquired by World Insurance Associates, via its financial sponsor Charlesbank Capital Partners, through an LBO on November 1, 2020 for an undisclosed sum.                       |
| Forward Strategies Insurance Brokerage | Provider of insurance services. The company offers marketing annuities, life insurance, long-term care and hybrid products including case design, lead program creation and referral systems.  | The company was acquired by AmeriLife Group, via its financial sponsors Thomas H. Lee Partners, Waterfield Group and Cannae Holdings, through an LBO on November 5, 2020 for an undisclosed sum. |
| Glick Insurance                        | Operator of an insurance agency in North Carolina, US. The company provides auto, home and commercial insurance as well as other financial and retirement products to its customers.   | The company was acquired by Relation Insurance Services, via its financial sponsor Aquiline Capital Partners, through an LBO on November 3, 2020 for an undisclosed sum.                         |
| Global Claims Services                 | Provider of insurance services intended to help property insurance companies effectively settle claims worldwide. The company custom-fits its service offering to meet the unique needs of each international insurance market, helping property insurance companies settle claims in the United States, Canada and the United Kingdom via independent subsidiary companies. | The company was acquired by Constellation Affiliated Partners, via its financial sponsor RedBird Capital Partners, through an LBO on November 3, 2020 for an undisclosed sum.                    |

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| Insurance Solutions Network | Provider of a range of insurance solutions serving businesses in the Chicagoland area. The company specializes in light manufacturing and employee benefits and offers comprehensive program designs, competitive pricing and efficient claim services.  | The company was acquired by World Insurance Associates, via its financial sponsor Charlesbank Capital Partners, through an LBO on November 1, 2020 for an undisclosed sum. The acquisition gives World Insurance Associates a Chicago-area location and increases its presence in Illinois.  |
| Insure All                  | Operator of an insurance agency. The company provides personal and commercial insurance services including home, auto, life and business insurance to its clients.   | The company was acquired by Hub International, via its financial sponsors HarbourVest Partners, Hellman & Friedman, Alpinvest Partners and Altas Partners, through an LBO on November 3, 2020 for an undisclosed sum.  |
| ISU - Wiseman Insurance     | Operator of an insurance agency based in Provo, Utah. The company offers automobile, health, business, life, workers compensation and other insurance products and also provides insurance, risk management and claims services, enabling clients to get a broad option of products at affordable rates.   | The company was acquired by Inszone Insurance, via its financial sponsor BHMS Investments, through an LBO on November 11, 2020 for an undisclosed sum. The acquisition enables Inszone Insurance to expand its operations via an entry into Utah market.   |
| Johnson Claim Service       | Operator of a claims specialist company in the insurance industry. The company offers third party administration, adjustment & appraisal services and specialist end-to-end claims solutions mostly to London market brokers and insurance businesses.   | The company was acquired by Davies Group, via its financial sponsors HGGC and Alberta Investment Management, through an LBO on November 2, 2020, for an undisclosed sum.   |
| NGC US                      | Provider of mobile payment and gift card fulfillment services for loyalty, rewards and incentive programs. The company specializes in B2B incentive, rewards and loyalty program services focused on prepaid gift cards and connects retail brands with the corporate & consumer marketplaces through its gift card API, mobile payment applications, B2B and B2C gift card eCommerce platforms, physical and digital fulfillment options. | The company was acquired by Blackhawk Network Holdings, via its financial sponsors Silver Lake Management, P2 Capital Partners and ACE & Company, through an LBO on November 6, 2020 for an undisclosed sum. The acquisition expands Blackhawk Network Holdings' North American incentives portfolio and enhances vertical integration for end-to-end program management to fulfillment. |
| Olson Insurance Agency      | Operator of an insurance agency based in Springfield, Virginia. The company offers personal and commercial insurance services which include home, auto, life and business insurance.   | The company was acquired by Hub International, via its financial sponsors Alpinvest Partners, Altas Partners, HarbourVest Partners and Hellman & Friedman, through an LBO on November 3, 2020, for an undisclosed sum.   |

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| Shine Wealth Partners               | Provider of investment advisory services to high net worth individuals. The company's investment advisory services include retail banking, estate planning, legal resources, tax and investment management services, enabling clients to avail guidance in making the right choices for future success and well-being. | The company was acquired by CAPTRUST Financial Advisors, via its financial sponsor GTCR, through an LBO on November 12, 2020 for an undisclosed sum.   |
| Sierra Insurance Associates         | Provider of insurance brokerage services based in Truckee, California. The company offers a range of insurance services including home, automotive, business, commercial, residential and health insurance to its clients.   | The company was acquired by Heffernan Insurance Brokers, via its financial sponsor SkyKnight Capital, through an LBO on November 1, 2020 for an undisclosed sum.   |
| Trinity Transportation Services     | Operator of a Managing General Agency (MGA) dedicated to the motor insurance industry. The company offers commercial auto, general liability, property, inland marine and excess and umbrella coverages for towing recovery operations and vehicles.   | The company was acquired by Constellation Affiliated Partners, via its financial sponsor RedBird Capital Partners, through an LBO on November 3, 2020 for an undisclosed sum.  |
| Tucker Insurance Service            | Operator of a full-service insurance agency committed to providing suitable coverage at a competitive price. The company caters to the insurance needs of individuals and families and small to large business concerns by helping them understand their insurance options so they can make informed decisions.        | The company was acquired by World Insurance Associates, via its financial sponsor Charlesbank Capital Partners, through an LBO on November 1, 2020 for an undisclosed sum.   |
| United Shortline Insurance Services | Provider of insurance solutions intended for the railroad industry. The company's service include railroad liability, railroad protective, railroad inland marine and railroad contractual services further providing quality coverage and service in order to help the railroad remain profitable.                    | The company was acquired by Hub International, via its financial sponsors Hellman & Friedman, HarbourVest Partners, Altas Partners and AlInvest Partners, through an LBO on November 19, 2020 for an undisclosed sum. The acquisition will complement and strengthen Hub International's growing rail practice in Kansas City, Missouri. |