

Financial Services Deals for June 2021

Company Name	Description	Deal Synopsis
AFI Wealth Strategies	Provider of wealth management services to high-net-worth individuals, families and their businesses. The company offers financial and business planning, institutional consultation, longevity planning, sustainable investing, portfolio management as well as wealth strategy creation, thereby helping its clients channelize their investments and make better financial decisions.	The company was acquired by Mercer Advisors, via its financial sponsors Genstar Capital and Oak Hill Capital, through an LBO on June 23, 2021 for an undisclosed sum.
Agribusiness Risk Underwriters	Provider of insurance, underwriting and loss control services intended for poultry farm businesses. The company offers easy and efficient direct bill plans, instant electronic policy issuance, collaborative loss control programs for contract poultry growers in order to reduce losses on insured farms.	The company was acquired by Accelerant Holdings, via its financial sponsor Altamont Capital Partners, through an LBO on June 8, 2021 for an undisclosed sum.
Amdg Financial Advisory Services	Provider of investment advisory services based in Plymouth, Michigan. The company offers wealth management and investment services to its clients.	The company was acquired by Savant Wealth Management, via its financial sponsors The Cynosure Group and Nonami Investments, through an LBO on June 30, 2021 for an undisclosed sum.
B&H Insurance	Provider of insurance services to individuals and businesses. The company offers business insurance, personal insurance, employee benefits, safety services and human resources services to its clients.	The company was acquired by AssuredPartners, via its financial sponsors HarbourVest Partners and GTCR, through a LBO on June 11, 2021 for an undisclosed sum.
Concert Insurance Company	Operator of an insurance company specializing in property and casualty insurances. The company provides a range of coverages including personal and commercial auto insurance, general liability, natural calamity and general liability insurances, offering tailored solutions that fit clients' risk requirements.	The company was acquired by Concert Group Holdings, via its financial sponsors Century Equity Partners and WT Holdings, through an LBO on June 2, 2021 for an undisclosed sum.
Confie Holding	Provider of insurance brokerage services in the United States. The company is engaged in the distribution of insurance products is primarily focused on personal lines and small commercial insurance.	The company was acquired by Alliant Insurance Services, via its financial sponsors Apollo Investment, Auburn Hill Capital, Public Sector Pension Investment Board and Stone Point Capital, through an LBO on June 8, 2021 for an undisclosed sum. This agreement brings the company's extensive family of leading personal insurance brands, more than 3,500 employees and in excess of 1 million customers under the Alliant Insurance Services banner.

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Corporate Solutions Life Reinsurance	Operator of a variable annuity reinsurance company. The company is authorized to operate in several states, including New York, and primarily reinsures third-party variable annuity guaranteed minimum death benefit (GMDB) and guaranteed minimum income benefit (GMIB) riders.	The company was acquired by Venerable Holdings, via its financial sponsors Reverence Capital Partners, Apollo Global Management and Crestview Partners through a \$300 million LBO on June 1, 2021.
Dash Financial Technologies	Developer of financial analysis tools designed for options and equities trading. The company's customized financial trading technology offers transparency and control and an end to end product suite, enabling traders and clients with a front-end trading platform to access routing technology and post-trade analytics and reporting capabilities to analyze and adapt their trading strategies.	The company was acquired by ION Group, via its financial sponsor The Carlyle Group, through an LBO on June 2, 2021 for an undisclosed sum.
Emphasis Benefits	Operator of an employee benefits brokerage agency to middle-market clients. The company, along with business insurance services, engages in designing plans and programs that enhance the business operations of its clients, complement retention efforts with meaningful benefit offerings and simplify the complicated aspects of benefits administration.	The company was acquired by NFP, via its financial sponsors HPS Investment Partners, Stone Point Capital and Madison Dearborn Partners, through an LBO on June 23, 2021 for an undisclosed sum.
EnterMedicare	Developer of a digital medical care platform intended to make medical care and healthcare more accessible. The company's platform permits a modern flow of information from insurance carriers, through sales channels to consumers as well as delivers information from the consumer back to the insurer to improve personalization of products and services, enabling consumers to optimize financial outcomes related to health.	The company was acquired by Hub International, via its financial sponsors AlInvest Partners, Atlas Partners, HarbourVest Partners and Hellman & Friedman, through an LBO on June 8, 2021 for an undisclosed sum.

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Epstein Financial	Provider of investment advisory services intended to create a retirement plan for the plan sponsor and their employees. The company provides corporate retirement plan consulting, compliance, regulatory guidance and wealth management services helping clients maintain a successful retirement program that will assist their employees to achieve success and security.	The company was acquired by Hub International, via its financial sponsors HarbourVest Partners, Hellman & Friedman, Alpinvest Partners and Altas Partners through an LBO on June 2, 2021 for an undisclosed sum. This move continues to strengthen Hub's retirement and wealth management services (Hub RPW) with the addition of talent and resources to develop more comprehensive strategies for clients.
Ever.ag	Provider of insurance services to dairy, grain and livestock sectors. The company offers crop insurance, commodity brokerage, technology and other services to its clients.	The company was acquired by Dairy.com, via its financial sponsors L Capital (San Francisco), APES Ventures, Banneker Partners and Farol Asset Management, through an LBO on June 28, 2021 for an undisclosed sum.
Family Tree Insurance Solutions	Operator of an independent insurance agency intended to connect customers with insurance brokers. The company offers a wide range of products including life, home, auto and commercial insurance, enabling customers to choose personalized plans as per their needs.	The company was acquired by World Insurance Associates, via its financial sponsor Charlesbank Capital Partners, through an LBO on June 1, 2021 for an undisclosed sum.
First Choice Appraisal Management	Provider of appraisal management services intended to support mortgage lenders. The company offers automated valuation models, desktop appraisals and property inspection reports, thereby helping its clients in reducing collateral risks and take better lending decisions.	The company was acquired by Nationwide Property & Appraisal Services, via its financial sponsors Southfield Mezzanine Capital and Corridor Capital, through an LBO on June 8, 2021 for an undisclosed sum.
Golden Bear Consulting Group	Operator of boutique regulatory compliance consulting firm intended for established and startup financial services firms. The company offers outsourced compliance resources, registration assistance, mock audits, regulatory filings and expertise, thereby helping clients including investment managers, registered investment companies, hedge funds and private equity fund managers in their daily operations, resulting in a stronger, more focused and competitive firm.	The company was acquired by Foreside Financial Group, via its financial sponsor Lovell Minnick Partners, through an LBO on June 8, 2021 for an undisclosed sum.

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Goodman Insurance Services	Provider of insurance brokerage services based in Foothill Ranch, California. The company offers specialty property and casualty insurance advisory services to its clients	The company was acquired by AssuredPartners, via its financial sponsors GTCR and HarbourVest Partners, through an LBO on June 23, 2021 for an undisclosed sum.
Hoover Financial Advisors	Provider of financial advisory and investment management services intended for individuals, executives and retirees. The company offers cash flow services, review and analysis of income tax strategies, education planning, estate planning, retirement analysis and investment analysis, thereby enabling clients to achieve their financial goals and objectives.	The company was acquired by Wealth Enhancement Group, via its financial sponsor TA Associates Management, through LBO on June 3, 2021 for an undisclosed sum.
Investors Economic Assurance	Provider of accounting, administrative and advisory services to the investment management community. The company's capital administration platform integrates with other investment accounting platforms and offers a range of solutions including waterfall calculations, carried-interest allocation, capital forecasting, expense allocations, capital associations and clawback accruals to alternative investment managers, general partners (GPs) and limited partners (LPs), providing dependable, cost-effective operational support that meets the demands of its clients in a complex, challenging and competitive environment.	The company was acquired by Alter Domus, via its financial sponsor Permira, through an LBO on June 21, 2021 for an undisclosed sum. The acquisition bolsters Alter Domus' technology offering and strengthens its Manhattan office and coast-to-coast footprint.
Maximum Senior Benefits	Provider of insurance services intended for underserved generations of people. The company offers services to cover final expenses and benefits, thereby enabling seniors to covers the costly, stressful financial decisions for their estate.	The company was acquired by AmeriLife Group, via its financial sponsors Thomas H. Lee Partners and Waterfield Group, through an LBO on June 29, 2021 for an undisclosed sum.
South Risk Management	Provider of risk management and insurance broking and consulting services across the Southeast United States. The company offers client risk solutions including employee benefits, surety bonds and commercial and personal insurance to large and small businesses, families and individuals, enabling clients to effectively fulfill their insurance needs.	The company was acquired by Propel Insurance, via its financial sponsor Flexpoint Ford, through an LBO on June 1, 2021 for an undisclosed sum. The acquisition expands Propel Insurance's presence into South Carolina and adds to its existing Southeast footprint, which includes Knoxville, Charlotte, Atlanta and Orlando.

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Stewardship Financial Advisors	Provider of comprehensive financial planning and asset management services intended for individuals, businesses and retirees. The company offers a range of holistic planning services encompassing estate planning, asset and risk management, tax and retirement income planning as well as investment services, thereby enabling clients to meet their long-term financial goals and succeed.	The company was acquired by CAPTRUST Financial Advisors, via its financial sponsor GTCR, through an LBO on June 9, 2021 for an undisclosed sum.
Theodore Group	Distributor of life insurance products based in Kissimmee, Florida. The company specializes in mortgage protection, final expense and advanced markets and offers training services and support to agents, enabling clients to meet their life insurance needs.	The company was acquired by Integrity Marketing Group, via its financial sponsors Harvest Partners and HGGC, through an LBO on June 15, 2021 for an undisclosed sum.
Titan Regulation & Advisory	Provider of compliance consulting services intended for complex financial institutions. The company offers registration services, compliance manuals, market access reviews and anti-money laundering programs, enabling banks, state-licensed mortgage lenders, commodity trading advisor (CTO) and commodity pool operator (CPO), SEC-registered investment advisers, FINRA and broker-dealers to evaluate changes in their business model and operations as well as understand and mitigate the impact of the regulatory landscape.	The company was acquired by Waystone, via its financial sponsor MML Capital Partners, through an LBO on June 16, 2021 for an undisclosed sum.
Unified Health	Provider of telesales brokerage services intended to help in the selection of an appropriate Medicare plan. The company offers assistance and insights on the available medical coverage options after evaluating the medical needs of its customers, thereby helping them in finding a coverage plan that complements both their budget and requirements.	The company was acquired by Integrity Marketing Group, via its financial sponsors Harvest Partners and HGGC, through an LBO on June 2, 2021 for an undisclosed sum.
Voya Financial Advisors (Independent Financial Planning Channel)	Provider of independent financial planning services. The company provides guidance, advice and financial wellness services to clients.	The company, a subsidiary of Voya Financial, was acquired by Cetera Financial Group, via its financial sponsor Genstar Capital, through an LBO on June 9, 2021 for an undisclosed sum.

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Walker & Associates Services	Provider of personal and commercial insurance services throughout North Carolina. The company offers auto insurance, home insurance, life insurance, renters insurance as well as travel insurance to customers.	The company was acquired by Relation Insurance Services, via its financial sponsor Aquiline Capital Partners, through an LBO on June 30, 2021 for an undisclosed sum.