

## Financial Services Deals for July 2021

Company Name	Description	Deal Synopsis
Aegis Retirement Group	Operator of retirement plan company based in Memphis, Tennessee. The company offers consulting, compliance, regulatory guidance and wealth management services, helping clients with tailored plans and investment advisory based on their needs.	The company was acquired by Hub International, via its financial sponsors Alpinvest Partners, Altas Partners, HarbourVest Partners, Hellman & Friedman and Alaska Permanent Fund, through an LBO on July 1, 2021 for an undisclosed sum.
American Construction Source	Operator of a holding company serving as a lumber and building materials (LBM) distribution platform. The company seeks to strengthen and expand the company's core business through acquisitions and provides lumber and building materials (LBM) businesses the resources, leverage and focus to cater to the needs of custom home builders, repair and remodel contractors, and do-it-yourself homeowners.	The company was acquired by US LBM Holdings, via its financial sponsor Bain Capital, through an LBO on July 6, 2021 for an undisclosed sum.
Carson Wealth Management Group	Provider of wealth management tools and services intended for financial advisors and direct clients. The company offers various services also include financial planning, estate planning, tax planning, business planning, retirement planning, investment management and private client services to advisors, offering services including asset management, research, marketing and compliance.	Long Ridge Equity Partners sold a 29% stake in the company to Bain Capital for \$290 million on July 14, 2021.
Consilium Financial Group	Provider of wealth advisory services in the financial services industry. The company offers a variety of services which include risk management, tax and estate planning as well as investment services for high-net-worth individuals (HNIs) and families, enabling clients to meet their wealth advisory needs.	The company was acquired by Merit Financial Advisors, via its financial sponsor HGGC, through an LBO on July 30, 2021 for an undisclosed sum. The acquisition enables Merit Financial Advisors to broaden its footprints in the greater Atlanta regions.
Crossland Insurance Agency	Operator of insurance agency based in New Iberia, Louisiana. The company offers a variety of insurance services which include commercial vehicle, home, business, commercial and property insurance, enabling clients to meet their insurance needs.	The company was acquired by World Insurance Associates, via its financial sponsor Charlesbank Capital Partners, through an LBO on July 8, 2021 for an undisclosed sum.

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Easley Hedrick Insurance & Financial	Provider of insurance services intended to serve as a one-stop-shop for all insurance-related needs. The company offers a wide range of customized insurance services including home, auto, commercial, life, umbrella and flood for all business and personal insurance needs from several national and regional carriers, thereby providing multiple insurance services for specific situations at a competitive price.	The company was acquired by The Hilb Group, via its financial sponsor The Carlyle Group, through an LBO on July 1, 2021 for an undisclosed sum.
Farr, Miller & Washington	Provider of investment services to individual and institutional clients with comprehensive, conservative and long-term investment portfolios. The company works with clients to help prioritize financial goals across the accumulation, growth, preservation, and income and distribution stages of their financial life cycle and they also help to ensure that the proper healthcare and estate documents are in place, working with clients to adjust the plan and portfolio accordingly.	The company was acquired by Hightower Advisors, via its financial sponsors Neuberger Berman, Goldman Sachs Asset Management and Thomas H. Lee Partners, through an LBO on July 27, 2021 for an undisclosed sum.
First Florida Insurance	Operator of insurance agency intended high-net-worth individuals and million-dollar residences. The company offers auto, fine arts and collectibles, home and estates, yachts and watercraft, jewelry and umbrella insurance, helping clients in case of uncertainties.	The company was acquired by Hub International, via its financial sponsors Alpinvest Partners, Altas Partners, HarbourVest Partners, Hellman & Friedman and Alaska Permanent Fund, through an LBO on July 8, 2021 for an undisclosed sum.
First Security Company	Operator of an insurance agency based in Hickory, North Carolina. The company offers customized business and personal insurance solutions including home, auto, cyber liability, workers' compensation and various other types of insurance products, helping clients to find effective coverage at competitive rates.	The company was acquired by High Street Insurance Partners, via its financial sponsors ABRY Partners and Huron Capital, through an LBO on July 8, 2021 for an undisclosed sum.

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Gary Blaustein Associates	Operator of a commercial and personal insurance agency primarily focused on the hospitality, contractor and habitational industries. The company offers a variety of insurance coverages and services which include cyber liability, employment practice liability, workers compensation inland marine, mobile home, motorcycle and other commercial and personal insurances, enabling local businesses and individuals to protect assets and manage their risks.	The company was acquired by Relation Insurance Services, via its financial sponsor Aquiline Capital Partners, through an LBO on July 1, 2021 for an undisclosed sum.
Generali Warranty Services	Provider of extended warranty and service contract services. The company delivers a variety of solutions including service contract administration, 24/7 customer support, claims processing, contractual liability insurance policies and reinsurance captive solutions, helping its clients with extended service plans and contractual liability insurance solutions.	The company, a subsidiary of SCOR Global Life USA Reinsurance, was acquired by Applied Underwriters, via its financial sponsor, Quadrant Management, through an LBO on July 12, 2021 for an undisclosed sum. The acquisition will enable the development and expansion of its offerings nationwide.
Getzler Henrich & Associates	Operator of restructuring advisory firm intended for education, energy, healthcare, manufacturing, real estate and retail industries. The company offers financial and bankruptcy advisory, lean sigma and process improvement services, thereby helping clients in corporate turnaround and enhanced business performance for growth.	The company was acquired by Hilco Global, via its financial sponsor Caisse de dépôt et placement du Québec, through an LBO on July 6, 2021 for an undisclosed sum.
Giordano Wealth Management Group	Provider of wealth management advisory services based in Los Gatos, California.	The company was acquired by Allworth Financial, via its financial sponsors Ontario Teachers' Pension Plan and Lightyear Capital, through an LBO on July 14, 2021 for an undisclosed sum.
Global Bankers Insurance Group	Provider of insurance services based in Durham, North Carolina. The company offers insurance, financial services, healthcare services, revenue cycle management and information technology services to its clients.	The company, a subsidiary of Global Growth, was acquired by Aspida Holdings, via its financial sponsor Ares Management, through an LBO on July 15, 2021.

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Harvey Insurance Agency	Operator of an insurance and financial services firm based in Manassas, Virginia. The company specializes in car, home, boat, rental property and other personal lines types of insurance as well as insurance for small businesses property, liability, auto and workers compensation.	The company was acquired by The Hilb Group, via its financial sponsor The Carlyle Group, through an LBO on July 1, 2021 for an undisclosed sum.
Hasty Insurance Agency	Provider of insurance services based in Southern Pines, North Carolina. The company provides personal lines and commercial lines insurance solutions.	The company was acquired by Relation Insurance Services, via its financial sponsor Aquiline Capital Partners, through an LBO on July 7, 2021 for an undisclosed sum.
Health Quote of Rhode Island	Provider of insurance services to all residents of Wakefield, Rhode Island and throughout the entire state of Rhode Island.	The company was acquired by The Hilb Group, via its financial sponsor The Carlyle Group, through an LBO on July 27, 2021 for an undisclosed sum.
Hooper, Spuhler & Sturgeon Insurance Services	Provider of insurance services to individuals and businesses in Tulare, California. The company provides property and casualty, automotive, life and health, farm and ranch insurance to its clients.	The company was acquired by Relation Insurance Services, via its financial sponsor Aquiline Capital Partners, through an LBO on July 15, 2021 for an undisclosed sum.
InTelCo Management	Asbestos liabilities and related insurance assets holding company.	The company, a subsidiary of Itt, was acquired by Delticus, via its financial sponsor Warburg Pincus, through an LBO on July 1, 2021.
Kaliff Insurance	Provider of specialty insurance intended for the event management industry. The company offers insurance for fairs, festivals, carnivals, events and special occasions, thereby helping its clients in eliminating financial risks associated with organizing and attending an event.	The company was acquired by Scottish American, via its financial sponsors M2O, Samson Investment Partners and The Cambria Group, through an LBO on July 1, 2021 for an undisclosed sum.
McCue Captains Agency	Provider of insurance services based in Little Silver, New Jersey. The company specializes in property, liability, life and benefits insurance for both business and personal needs and offers a wide range of products and plans through multiple national and regional insurance companies.	The company was acquired by World Insurance Associates, via its financial sponsor Charlesbank Capital Partners, through an LBO on July 15, 2021 for an undisclosed sum.
Medalist Partners Corporate Finance	Provider of investment advisory and management services based in Alpharetta, Georgia. The company operates as a corporate credit firm offering leveraged and senior secured loans.	JMP Group sold a 49.9% stake in the company to MacNeill Pride Group on July 1, 2021. As a result of the transaction MacNeill Pride Group holds a 100% stake in the company.

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Nachman Norwood & Parrott	Provider of financial planning and consulting services for high-net-worth individuals, qualified plans and endowments and foundations. The company offers services like wealth management and qualified plan consulting, thereby helping clients in keeping up with the rapidly changing environment as needed.	The company was acquired by CAPTRUST Financial Advisors, via its financial sponsor GTCR, through an LBO on July 8, 2021 for an undisclosed sum.
Pete Webb Agency	Operator of insurance agency intended for individuals and businesses. The company offers automotive, home, commercial, car, pet, farm, life and food processing insurance, dedicated to assisting clients for current and future potential risk	The company was acquired by Hub International, via its financial sponsors AlInvest Partners, Altas Partners, HarbourVest Partners, Hellman & Friedman and Alaska Permanent Fund, through an LBO on July 9, 2021 for an undisclosed sum.
Risk Point Consulting	Provider of professional sports and college athletics contractual bonus coverage and over-redemption insurance services based in Marietta, Georgia. The company offers professional sports and consumer and retail promotions, enabling clients to manage sponsorships, incentive bonuses and performance-based retainer adjustments.	The company was acquired by Hub International, via its financial sponsors Alaska Permanent Fund, AlInvest Partners, Altas Partners, HarbourVest Partners and Hellman & Friedman through an LBO on July 16, 2021 for an undisclosed sum.
Ryan Harris Group	Provider of insurance and financial services to individuals and businesses. The company provides personal and commercial automotive, life and home, contractor, workers compensation insurance, commercial general liability coverage and workers compensation benefits to its clients.	The company was acquired by The Hilb Group, via its financial sponsor The Carlyle Group, through an LBO on July 1, 2021 for an undisclosed sum.
Socius Insurance Services	Provider of insurance brokerage services for businesses. The company specializes in directors and officers insurance, errors and omissions insurance, employment practices liability insurance, cyber, property and casualty as well as umbrella coverages.	The company received an undisclosed amount of development capital from ABRY Partners on July 1, 2021. The proceeds from the investment will be used to accelerate the company's strategic growth plan and pursue acquisition activities.
SouthEast Agency	Provider of all-lines property insurance and casualty insurance based in Jewett City, Connecticut. The company specializes in contractors, commercial transportation, hospitality, and real estate, providing clients multi-purpose insurance services effectively.	The company was acquired by Relation Insurance Services, via its financial sponsor Aquiline Capital Partners, through an LBO on July 14, 2021 for an undisclosed sum.

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Springberg McAndrew Financial Services & Insurance	Operator of insurance broking company based in Lake Havasu City, Arizona. The company offers Medicare, dental, short term, long term, automotive, health, home and group insurance along with financial services like investment advisory and wealth management, thereby catering to clients as per their financial needs.	The company was acquired by Crest Insurance, via its financial sponsor CIVC Partners, through an LBO on July 1, 2021 for an undisclosed sum.
STAT Revenue	Provider of zero balance (closed) claims review and recovery services intended for hospitals and health systems. The company offers highly specialized and forensic-like reviews of zero balance claim to identify underpayments and recover lost revenue from government and commercial payers and also provides consulting and education to help clients uncover the root causes of recurring problems that can lead to denials and write-offs and improve their current revenue controls, thereby enabling the hospital to minimize its future exposure to lost revenue.	The company was acquired by Healthcare Financial Resources, via its financial sponsor Housatonic Partners, through an LBO on July 22, 2021 for an undisclosed sum.
StrucSure Home Warranty	Provides home warranty services to builders, remodelers, home buyers and other construction-related contractors across the United States. The company offers a variety of warranty products and services which include coverage on new construction for workmanship, materials, wiring, piping, ductwork and structural defects as well as offer custom warranty programs for businesses in the construction, restoration and remediation industries, enabling clients to reduce costs, liabilities and legal fees and meet their warranty protection needs.	The company was acquired by Cypress Property & Casualty, via its financial sponsor Milestone Partners, through an LBO on July 27, 2021 for an undisclosed sum. The acquisition enables Cypress Property & Casualty to broaden its offerings in the home insurance industry.

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Sunrise Strategic Partners	Operator of a holding company based in Boulder, Colorado. The company primarily provides growth capital and expertise to emerging brands in the healthy, active and sustainable living space and partners with founders to add strategic value, share guidance on tactical priorities and leverage its industry relationships to maximize potential.	The company received an undisclosed amount of development capital from Trilantic North America on July 29, 2021. The funds will be used to invest in scale-up companies.
The SIG Insurance Agencies	Provider of insurance broking services across Connecticut, New York, Rhode Island and New Hampshire. The company offers different insurance products to individuals and businesses including personal, commercial, farm and agriculture and nationwide pet insurance, providing access to multiple policies, unbiased and objective advice as well as claims assistance and advocacy that fulfill clients' specific requirements.	The company was acquired by Relation Insurance Services, via its financial sponsor Aquiline Capital Partners, through an LBO on July 21, 2021 for an undisclosed sum. The acquisition strengthens Relation Insurance Services' existing capabilities and further expands the platform's geographic presence in the Northeast.
Trean Intermediaries	Provider of reinsurance services dedicated to the design and placement of reinsurance programs for specialty insurers, alternative risk programs, pools, trusts, reciprocals, and exchanges. The company specializes in workers' compensation, property and casualty, accident and health, personal auto, public entity and professional liability lines, providing clients alternative and creative insurance services.	The company, a subsidiary of Trean Insurance Group, was acquired by BMS Group, via its financial sponsors Preservation Capital Partners and British Columbia Investment Management, through an LBO on July 9, 2021 for an undisclosed sum. The acquisition will strengthen BMS Group's geographic presence in areas such as Florida, North Carolina, Los Angeles and the Greater Boston Area.
Trusted Capital Group	Provider of investment and consulting services intended for education, local government and small-to-medium business segments. The company offers wealth management, retirement planning, institutional advisory, identity protection and contract consulting, thereby helping clients to plan their financial future positively.	The company was acquired by Hub International, via its financial sponsors AlInvest Partners, Altas Partners, HarbourVest Partners, Hellman & Friedman and Alaska Permanent Fund, through an LBO on July 7, 2021 for an undisclosed sum.

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UniVista Insurance	Provider of commercial and personal insurance. The company's products include auto insurance, home insurance, commercial insurance, life and health insurance as well as truck and motorcycle insurance and annuity products, thereby providing its customers with affordable insurance solutions that allow them to prepare and be protected in every situation.	The company received an undisclosed amount of development capital from Avance Investment Management on July 15, 2021. The financing is intended to be used for acquisition purposes. The company plans to expand its suite of offerings and franchises in Florida and across the United States through mergers & acquisitions as well as organic growth initiatives.
Ward Insurance	Provider of insurance services for individuals as well as businesses operating in construction, healthcare, hospitality, manufacturing and wood products industries. The company offers commercial and personal insurance, employee benefits and risk solutions, delivering the right coverage and protection, enabling clients to reduce losses and lower the cost of insurance.	The company was acquired by Hub International, via its financial sponsors HarbourVest Partners, Alaska Permanent Fund, Hellman & Friedman, AlInvest Partners and Altas Partners, through an LBO on July 6, 2021 for an undisclosed sum.
Western Home Insurance Company	Provider of property and casualty insurance services. The company underwrites property and casualty insurance for individuals, families and businesses across five states in the United States.	The company, a subsidiary of Western National Insurance Group, was acquired by Obsidian Specialty, via its financial sponsor Genstar Capital, through an LBO on July 7, 2021 for an undisclosed sum. The acquisition supports the company's strategic growth plans and will provide Obsidian Specialty's current and existing program managers access to countrywide admitted insurance capabilities.
Your Family Bank	Provider of financial services intended to educate clients on strategies to eliminate debt. The company offers business and financial planning services, enabling its clients to get out of debt, reduce their taxes and protect and increase their retirement savings.	The company was acquired by AmeriLife Group, via its financial sponsors Thomas H. Lee Partners and Waterfield Group, through an LBO on July 23, 2021 for an undisclosed sum.