

Financial Services Deals for July 2022

Company Name	Description	Deal Synopsis
Andreini & Company	Operator of an insurance brokerage firm based in San Mateo, California. The company is a full-service insurance brokerage offering a complete spectrum of insurance products and solutions in the areas of commercial lines, personal insurance, aviation, risk management, employee benefits, claims and loss control services and offers a customized approach to clients.	The company was acquired by PCF Insurance Services, via its financial sponsors Owl Rock Capital Corporation BDC and HGGC, through an LBO on July 13, 2022 for an undisclosed amount.
B-W Insurance Agency	Provider of insurance services to families and businesses based in Colorado, United States. The company specializes in offering multiple insurance services including personal, automobiles, homeowners, renters, recreational vehicles, business insurance, workers compensation, bonds and term life insurance, thereby enabling customers and clients to cover their risk exposures.	The company was acquired by Inszone Insurance, via its financial sponsor BHMS Investments, through an LBO on July 21, 2022 for an undisclosed amount.
Bandon Holdings	Operator of fitness franchisee clubs based in Austin, Texas. The company operates various fitness clubs across several states including Texas, Oklahoma and Kansas, helping promote a healthy lifestyle.	The company was acquired by Sentinel Capital Partners through an LBO on July 28, 2022 for an undisclosed amount. Sentinel Capital Partners' expertise in helping companies in the franchising industry accelerate growth will enable the company execute on the many available growth opportunities and realize its long-term strategic business goals.
Bonds	Operator of surety bonds intended for the construction industry. The company represents bond markets and support programs up to \$500 million, helping to secure performance and payment bonds for projects.	The company was acquired by Risk Strategies Company, via its financial sponsor Kelso Private Equity, through an LBO on July 20, 2022 for an undisclosed amount.

Financial Services Deals for July 2022

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Chesapeake Brokerage	Operator of a financial brokerage firm intended to serve independent agents and advisors. The company specializes in the distribution of life, LTC and annuity products and offers business planning, family planning, estate planning, income planning, charitable planning and life settlement services and always try to serve the needs of its producer partners with the strategies, underwriting and products we share and recommend can change lives.	The company was acquired by Simplicity Group Holdings, via its financial sponsors Twin Bridge Capital Partners and Lee Equity Partners, through an LBO on July 12, 2022 for an undisclosed amount.
Compass Insurance Services	Operator of an insurance agency intended to serve real estate, construction, transportation, healthcare, agribusiness, finance and nonprofit. The company offers commercial and personal insurance, group health and benefits, as well as individual life and health benefits, thereby ensuring round-the-clock support and competitive pricing for customers.	The company was acquired by Hub International, via its financial sponsors Alpinvest Partners, Altas Partners, Apax Partners, HarbourVest Partners, Hellman & Friedman and Alaska Permanent Fund through an LBO on July 7, 2022 for an undisclosed amount.
Coverage Specialists	Operator of insurance agency committed to fulfilling personal and commercial insurance needs. The company offers services including commercial truckers insurance, business insurance, auto insurance as well as retirement planning and life insurance service, providing the right policy at a competitive price.	The company was acquired by World Insurance Associates, via its financial sponsor Charlesbank Capital Partners, through an LBO on July 1, 2022 for an undisclosed amount.
DEF 401(k) Advisors	Operator of an independent retirement planning services company intended to serve organizations and their employees. The company offers investment decisions, retirement planning, financial planning and financial wellness planning, thereby helping clients to realize the value of their retirement plan benefits.	The company was acquired by Alera Group, via its financial sponsors Flexpoint Ford, Genstar Capital, Maranon Capital and The Carlyle Group, through an LBO on July 14, 2022 for an undisclosed amount.

Financial Services Deals for July 2022

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Frontier Wealth Management	Operator of an investment management company intended to provide customized investment plans. The company offers financial planning, investment advisory, insurance, consulting and wealth management services, thereby helping clients to meet their financial goals.	The company was acquired by CAPTRUST Financial Advisors, via its financial sponsor GTCR, through an LBO on July 26, 2022 for an undisclosed amount.
HCO Private Wealth	Provider of wealth management services intended for high net worth and high-income families. The company offers a wide range of services including financial planning, investment management, advanced tax strategies, estate planning and administration and asset protection, thereby enabling clients to achieve confidence and clarity about every aspect of their financial life.	The company was acquired by Mercer Advisors, via its financial sponsors Genstar Capital and Oak Hill Capital, through an LBO on July 7, 2022 for an undisclosed amount.
Insurance	Provider of insurance brokerage services specializing in personal and commercial insurance. The company insurance product includes commercial auto, general liability, property, renters insurance, valuable items and recreational vehicles, providing clients with insurance products suitable for them in mitigating risk.	The company was acquired by Relation Insurance Services, via its financial sponsor Aquiline Capital Partners, through an LBO on July 19, 2022 for an undisclosed amount. The acquisition expands Relation Insurance Services' presence in Maryland and further expands its offerings in the East.
Kemmons Wilson Insurance Group	Provider of insurance brokerage services catering to the hotel, hospitality and lodging sector. The company offers insurance including professional liability, product liability, workers' compensation, business income, crime, general liability and personal coverage, helping clients get insured and manage risk.	The company was acquired by Virtus, via its financial sponsor Agman, through an LBO on July 21, 2022 for an undisclosed amount.
King and Cushman	Operator of an insurance agency based in Northampton, Massachusetts. The company offers auto insurance, personal insurance as well as business and commercial insurance, enabling clients to receive different coverage options as per their pricing requirements.	The company was acquired by The Hilb Group, via its financial sponsor The Carlyle Group, through an LBO on July 1, 2022 for an undisclosed amount.

Financial Services Deals for July 2022

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Life Policy Pros	Provider of financial and advisory services intended to identify, implement and execute life insurance solutions for other financial professionals. The company specializes in offering services including the analysis of business objectives, delivering ideas, concepts and techniques and designing marketing plans, thereby working in a partnering capacity with investment and insurance advisors focusing on planning for clients and enabling them to grow in revenue.	The company was acquired by Simplicity Group Holdings, via its financial sponsors Lee Equity Partners and Twin Bridge Capital Partners, through an LBO on July 14, 2022 for an undisclosed amount.
Mathis, Tibbets & Mathis	Provider of commercial insurance services intended to help clients manage their risks and exposure. The company specializes in offering multiple services including aircraft insurance, cyber liability, commercial insurance, data breach coverage, sports, entertainment and fitness insurance coverage and claims services, thereby creating a program to cover, transfer and reduce the clients' exposures.	The company was acquired by Higginbotham Insurance Group, via its financial sponsor Stone Point Capital, through an LBO on July 13, 2022 for an undisclosed amount.
Metrus Energy	Developer and financier of large-scale energy efficiency projects intended to serve as an Energy as a Service (EaaS) provider. The company offers end-to-end services that suffice all services from project development to no-first-cost financing services, removing initial investment and providing facilities with the financial, operational and environmental benefits of energy efficiency measures.	The company was acquired by Energy Capital Partners through an LBO on July 7, 2022 for an undisclosed amount.
Noyle Johnson Group	Provider of personal and commercial insurances serving Central Vermont and the Northeast Kingdom. The company offers a wide range of services including general liability, workers compensation, property insurance, cyber coverage, farm insurance and liquor coverage, thereby providing clients with the coverage at an affordable price.	The company was acquired by Alera Group, via its financial sponsors Genstar Capital, Maranon Capital, Flexpoint Ford and The Carlyle Group, through an LBO on July 14, 2022 for an undisclosed amount.

Financial Services Deals for July 2022

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Peak Performance Team	Provider of finance and insurance (F&I) products and wealth-building services intended to support independent and franchised automotive, power sports and recreational vehicle dealers. The company offers vehicle service contracts, gap insurance, environmental and maintenance packages, theft protection, lease protection and related ancillary products, thereby helping clients improve product sales, profitability and customer satisfaction through customized and flexible programs.	The company was acquired by PCF Insurance Services, via its financial sponsor HGGC, through an LBO on July 15, 2022 for an undisclosed amount.
Power Services Group	Operator of a holding company intended to provide turbine and generator maintenance services. The company offers maintenance, repairs and overhaul of steam, gas, wind turbines and balance of plant equipment for the power, industrial and petrochemical markets, enabling clients to deliver efficient results as per their business needs.	
Shaver-Robichaux Agency	Provider of independent insurance broking services intended to serve businesses and individuals. The company offers commercial and personal insurance services such as home, auto, health, life and recreation, thereby helping clients to save money and time and find the best rates for their specific needs.	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 8, 2022 for an undisclosed amount.
Starks Financial Group	Provider of financial planning and wealth management services intended to serve women, retirees, same-sex couples, financial delegators and socially responsible investors. The company offers investment management, retirement planning, estate planning and financial advisory services, enabling clients to achieve their personal and financial goals.	The company was acquired by Mercer Advisors, via its financial sponsors Genstar Capital and Oak Hill Capital, through an LBO on July 6, 2022 for an undisclosed amount.

Financial Services Deals for July 2022

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Stop Loss Insurance Brokers	Operator of an insurance agency intended to help clients meet their stop loss insurance needs by providing them with the most comprehensive coverage. The company specializes in stop-loss insurance for both businesses and municipalities with a comprehensive tracking and monitoring process and offers superior claims payment.	The company was acquired by Hub International, via its financial sponsors HarbourVest Partners, Alaska Permanent Fund, Hellman & Friedman, Northleaf Capital Partners and Altas Partners through an LBO on July 27, 2022 for an undisclosed amount.
The Financial Services Network	Provider of financial advisory services committed to adding real value to client's business. The company offers a wide range of services that include business consulting, portfolio consulting, compliance and operations, virtual administration, business transitions and technology consulting, thereby helping clients with qualified advisors.	The company was acquired by Mariner Wealth Advisors through an LBO on July 19, 2022 for an undisclosed amount.
Titus Wealth Management	Operator of registered investment advisor based in Larkspur, California. The company offers client brokerage and advisory assets, providing clients with financial well-being.	The company was acquired by Wealth Enhancement Group, via its financial sponsors, TA Associates Management and Onex through an LBO on July 14, 2022 for an undisclosed amount.
Townsquare Capital	Developer of an all-in-one advisor platform designed to help investment advisors realize their goals and attract new clients. The company offers services such as money manager vetting, portfolio construction & management, efficiency & structure audits, tax optimization and full-service trading operations including traditional execution and model delivery, thereby adding value to client portfolios with best-of-breed, strategically unique investment and trading strategies while optimizing the relative risk, cost-efficiency and tax impact on their portfolios.	The company was acquired by Orion Advisor Solutions, via its financial sponsors Genstar Capital, Talent Resources Ventures and TA Associates Management, through an LBO on July 1, 2022 for an undisclosed amount. The company brings additional assets to Orion Advisor Solutions' wealth management platform offering and helps provide growth-focused independent advisors access to a wider range of investment products, solutions and trading capabilities.

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Young Insurance Group	Operator of an insurance agency focused on personal and commercial insurance coverage. The company offers auto, home, renters, general liability, workers' compensation, commercial property and cyber liability insurance, thereby helping clients with insurance products suitable for them in mitigating risk.	The company was acquired by Inszone Insurance, via its financial sponsor BHMS Investments through an LBO on July 20, 2022 for an undisclosed amount.
Zinc Insurance Agency	Provider of insurance and risk management services intended for trucking, construction, contracting and motorsports industries. The company specializes in offering multiple services including group health insurance, Medicare, artists and craft artists insurance, contractor insurance, home and auto insurance, motorsports insurance and trucking insurance, thereby enabling businesses and individuals to cover their risk of uncertainty.	The company was acquired by PCF Insurance Services, via its financial sponsors HGGC and Owl Rock Capital Corporation BDC, through an LBO on July 27, 2022 for an undisclosed amount.