

## Financial Services Deals for June 2018

Company Name	Description	Deal Synopsis
Alerian Capital Management	Provider of transparent master limited partnerships (MLP), energy infrastructure benchmarks and analytics platform. The company's platform is widely used by industry executives, investment professionals, research analysts, and national media to analyze relative performance.	The company was acquired by Aretex Capital Partners through an LBO on June 29, 2018 for an undisclosed sum.
Aquesta Insurance Services	Provider of insurance programs. The company offers personal insurance and coastal insurance products among others, which are tailored as per requirements, enabling businesses to protect their investments at an efficient cost.	The company, a subsidiary of Aquesta Bank, was acquired by National Financial Partners, via its financial sponsors HPS Investment Partners, Madison Dearborn Partners and Stone Point Capital through an LBO on June 29, 2018 for an undisclosed sum. The acquisition strengthens National Financial Partners's commercial and personal lines client service model and expands their coastal risk expertise.
BAR Insurance Brokerage	Operator of an employee benefits firm in Waltham, Massachusetts. The company designs and reviews financial plans for personal as well as corporate clients, covering children's college education, protecting family's financial future or managing corporate legacy.	The company was acquired by Hilb Group, via its financial sponsor ABRY Partners, through an LBO on June 19, 2018 for an undisclosed amount. As a part of the transaction, BAR will join THG's New England operations and Rick Raisman, BAR's President, will work alongside THG's team to grow the region's benefits division.
Cimino Wealth Advisors	Provider of financial planning services intended for efficient management of wealth. The company provides personalized financial advisory for retirement, investment, insurance and tax, enabling its clients to plan for long-term financial success.	The company was acquired by Wealth Enhancement Group, via its financial sponsor Lightyear Capital, through an LBO on June 13, 2018 for an undisclosed sum.

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CRIF Lending Solutions	Provider of loan and deposit account origination, indirect lending, business process outsourcing, credit decisioning, data access and analytics solutions. The company's comprehensive suite of solutions includes consumer, business and point-of-sale loan software that combine innovative technology, services and consulting to enable clients to be leaders in the financial services industry.	The company was acquired by MeridianLink, via its financial sponsor Thoma Bravo, through an LBO on June 12, 2018. The transaction is expected to enable the combined MeridianLink and CRIF Lending Solutions organization to extend technology investments into areas that will provide financial institutions with leading edge lending solutions, privacy protections, and best-in-class data analytics.
Dwyer Group (NAS: DWYR)	Operator of a holding company of 11 service-based franchise organizations. The company's brands offer a diverse array of specialty services, primarily related to home maintenance or repairs through more than 2,700 franchises in 11 countries.	The company was acquired by Harvest Partners and Audax Group through an SBO on June 4, 2018, for an undisclosed sum.
OneMain Holdings (NYS: OMF)	Provider of customized loan and financial advisory services intended to offer personalized service from friendly loan specialists. The company offers easy, accessible applications for its loan program through a nationwide branch network and internet lending platform, enabling quick decisions on the loan application that is processed quickly along with discussing available loan options serving various sectors like commercial, military, business and advisory allowing for an outstanding customer experience at all times.	Fortress Investment Group sold a 40.589% stake in the company (NYS: OMF) to Apollo Global Management and Värde Partners for \$1.428 billion on June 25, 2018.
Presidio Petroleum	Operator of exploration and production companies intended to unlock value of acquired oil and gas reserves. The company's assets are majorly concentrated in oil and gas industry, enabling its clients to generate profit thorough leading operational practices and modern development technologies.	The company was acquired by Morgan Stanley Energy Partners through a \$58 million LBO on June 1, 2018. The investment was made to facilitate the acquisition from Midstates Petroleum Company Inc. (NYSE: MPO) of oil and natural gas properties in the western Anadarko Basin of Texas and Oklahoma and to support the growth of the Company's exploration and production ("E&P") business in the United States.

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Raton Capital	Provider of private banking products and services. The company engages in offering consumer banking products and services with the help of a team of experienced knowledgeable professionals who provide cash management and consumer banking services, enabling clients to receive customized services.	The company was acquired by FFP Group through an \$46.3 million LBO on June 27, 2018.
Renaissance Alliance Insurance Services	Provider of insurance distribution platform intended to support the growth of independent insurance agencies. The company's range of offerings includes providing its members with higher commissions, access to more carriers, products, markets and a set of services to agencies specializing in property and casualty insurance, thereby enabling higher growth and profitability.	The company was acquired by Long Arc Capital through a \$30 million LBO on June 26, 2018. The transaction will help the company to accelerate its expansion outside the New England region.
Ryan Specialty Group	Operator of a specialty insurance organization. The company offers wholesale brokerage and underwriting services to brokers, agents and insurance carriers.	The company was acquired by Onex through and an undisclosed investor a \$175 million LBO on June 4, 2018.
Spring Venture Group	Provider of inside sales and marketing services designed to offer products in the areas of Health and Life Insurance. The company's inside sales and marketing services deliver an unparalleled insurance shopping experience, enabling clients to save money and compare schemes, for the best rate possible.	The company received an undisclosed amount of development capital from Corsair Capital on June 29, 2018. The company intends to use the funds for continued expansion and increase their employee base to more than 600 in the last two years.
Sunlight Financial	Provider of loans for residential solar systems. The company's residential solar lending and credit facilities simplify and streamline online lending, enabling solar installers, sales organizations and equipment distributors nationwide to quickly empower homeowners with the benefits of system ownership and cost savings.	The company received \$50 million of development capital from FTV Capital on June 6, 2018. The investment will enhance the company's differentiated product platform to meet the needs of both homeowners and strategic partners.

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Validity Finance	Provider of client-focused commercial legal financing services in the United States to elevate fairness and client objectives in financing commercial and business legal disputes. The company operates as a litigation funding firm offering financial resources and strategic advisory services, through its offices in New York, Houston and Chicago, enabling clients and law firms to ensure complex legal disputes are resolved on their merits.	The company was acquired by TowerBrook Capital Partners through a \$250 million LBO on June 25, 2018. The funding will be used in the formation of the company.
Voya Financial (CBVA Business)	Provider of hedging services for variable annuity products. The company offers hedging strategies and programs to protect regulatory and rating agency capital of the variable annuities block from equity market movements through a strategy that focuses on the economic and regulatory stability of the underlying assets and statutory capital strength rather than reducing GAAP earnings volatility and judiciously looking for opportunities to accelerate the run-off of the block.	The CBVA Business of Voya Financial was acquired by Apollo Global Management, Crestview Partners, Athene Holding and Reverence Capital Partner through a \$315 million LBO on June 1, 2018.