

## Financial Services Deals for September 2018

Company Name	Description	Deal Synopsis
Access Holdco Management	Operator of an insurance managing general agency focused on the non-standard auto market. The company provides sales distribution, underwriting, policy administration, and claims processing for their insurance company partner. It also offers specialty property and casualty automobile insurance programs that include low down payments, flexible payment plans, easy reinstatements and bilingual customer services.	The company was acquired by HUB International, via its financial sponsor Hellman & Friedman, through an LBO on September 7, 2018 for an undisclosed amount.
Cambridge Associates	Owner and operator of a global investment firm. The company aims to help endowments & foundations, pension plans, and private clients implement and manage custom investment portfolios that generate outperformance so they can maximize their impact on the world.	The company received \$298.49 million of development capital from Sofina and other undisclosed investors on September 14, 2018.
Newport Group	Provider of retirement services intended for secure financial future through various retirement plans. The company's retirement and executive benefit plans, as well as investment and fiduciary consulting services are tailored to the needs of employers of every size, from small businesses to the Fortune 1000.	The company was acquired by Kelso Private Equity through an LBO in September 2018 for an undisclosed amount. Kelso-managed funds will hold a majority interest in the company with the Stone Point funds and management continuing to hold a minority interest.
Preferred Personal Insurance Agency	Provider of insurance services. The company offers customized home insurance, auto insurance, life insurance, valuable property insurance and umbrella insurance policies, providing customers with complete insurance coverage at an affordable price.	The company was acquired by Risk Strategies Company, via its financial sponsors HarbourVest Partners and Kelso Private Equity, through an LBO on September 25, 2018 for an undisclosed sum.

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Protect My Car	Provider of extended warranty service contracts. The company's services focus on extended warranty and maintenance plans for almost every vehicle including offers on auto insurance rates, homeowners insurance, mortgage ideal for consumers with cars less than 10 years old and with fewer than 150,000 miles, and whose manufacturer's warranty has expired or will expire soon. It serves as a vertically-integrated seller and administrator of vehicle service contracts and maintenance products that protect vehicle owners from unexpected costs of servicing, repairs and parts replacement.	The company was acquired by Crestview Partners and its management through an LBO on September 6, 2018 for an undisclosed sum.
Select Insurance Markets	Marketer of personal line standard insurance products. The company offers home and auto insurance products, providing customers with marketing guidance in choosing the right insurance coverage.	The company was acquired by Risk Strategies Company, via its financial sponsors HarbourVest Partners and Kelso Private Equity, through an LBO on September 25, 2018 for an undisclosed sum.
Strata Fund Solutions	Provider of administration and consulting services to the alternative investments industry. The company offers portfolio reporting, financial statement preparation, treasury management, investor services, portfolio and investor allocation tracking, capital and investment reporting, shadow accounting, customized supplemental reporting, and other related services.	The company received an undisclosed amount of development capital from FTV Capital and StepStone Group on September 6, 2018. The funds will be used to continue to invest in technology, product and client-centric service enhancements to deliver customized client solutions.