



# HARBOR VIEW

Investment Banking

## Financial Services & Technology

### ABOUT HVA

Harbor View Advisors provides sell-side and buy-side M&A advisory to innovative companies shaping the tech and services markets. Our unique approach combines the execution expertise of an investment bank with the strategic thinking of a management consulting firm to help our clients achieve their goals.

### SELL-SIDE & BUY-SIDE M&A ADVISORY

## ADVISING AT THE INTERSECTION OF FINANCIAL SERVICES & TECHNOLOGY

Financial Services and the technologies that enable them are rapidly evolving. At Harbor View Advisors, we combine decades of M&A expertise with industry operator experience. We provide industry insight that has 'walked in your shoes.' Our team advises founders, operators, strategic acquirers, and private equity investors, helping clients navigate complex transactions and capitalize on growth opportunities.

- Wealth & Asset Management
- Retirement Services
- Insurance Distribution
- Tax & Accounting
- Specialty Finance
- WealthTech
- MortgageTech
- InsurTech

### LEARN MORE ABOUT OUR EXPERTISE:

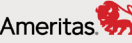


# Harbor View

Florida New York Colorado | 904.285.4278 | hvadvisors.com



# SUCCESSFUL OUTCOMES

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Each tombstone features the HVA client logo prominently at the top.

## OUR FINANCIAL SERVICES & TECHNOLOGY TEAM



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