



M&A Support Services

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Data-driven intelligence to identify, qualify, and prioritize acquisition targets

Product Description

- Convergence M&A Support Services use proprietary data and structured analytics to help firms identify, evaluate, and prioritize high-quality acquisition targets. The engagement aligns target selection with the buyer's growth objectives across Fund Services, Assurance, Tax, and Advisory services.

Product Benefits

- Accelerates the path from acquisition strategy to a qualified shortlist by screening the broader market with pre-existing, validated data.
- Improves strategic fit by comparing each candidate against the buyer's growth priorities, service-line objectives, client mix, and geographic goals.
- Reduces leadership time spent on low-fit candidates and identifies revenue, concentration, attrition, complexity, regulatory, and reputational risks earlier.
- Provides an objective basis for prioritization, reducing reliance on anecdotal market knowledge or seller-driven processes.

Product Features

- **Comprehensive Market Screening** - Reviews detailed business profiles covering 90,000 investment advisers and 12,000 service providers, rather than limiting the search to known or active sellers.
- **Multi-Factor Target Ranking** - Ranks candidates on current and future client revenue value, financial health, business and commercial risk profile, and alignment with buyer-defined KPIs.
- **Quality and Risk Analytics** - Assesses client attrition, key-account concentration, engagement complexity, and regulatory or reputational red flags before formal due diligence.

Market Opportunity

- M&A transactions in the fund services space remain active. Convergence supports top investors and their advisers by analyzing our database that includes the business profiles of 125,000 investment advisers and their active and inactive funds, including service-provider changes and adviser transactions. This lets users identify candidates and quantify what matters most in their investment thesis.

To Learn more about M&A Support Services

Contact George Evans at gevans@convergenceinc.com or Josh Demarco at jdemarco@convergenceinc.com