



## Evolve Capital Partners Advises Aegis on its Acquisition by Charles Taylor

**New York, NY, December 31, 2020** – [Evolve Capital Partners Inc.](#) (“Evolve”) is pleased to announce our role as the exclusive financial advisor to [Aegis Corporation](#) (“Aegis”) in its sale to [Charles Taylor](#), a global provider of services and technology solutions to the global insurance marketplace.

Aegis provides risk pools and self-insureds with customized insurance and claims management programs focused on the unique needs of public entities and municipal organizations. The business is headquartered in Brookfield, Wisconsin where approximately 45 employees oversee insurance programs for approximately 200 clients with \$350 million in annual premiums under management.

“The team at Evolve was an integral part of our process,” said John Dirkse, President of Aegis. “Their ability to proactively stay ahead of key transaction points during the entire engagement, coupled with their deep reach into the insurance services space, added tremendous value. We were absolutely impressed with their quality of work and look forward to continuing our relationship post-transaction.”

This latest transaction reflects Evolve’s strategic focus on technology enabled firms in the insurance space. This transaction follows our successful insurance transaction advising Davies Group on its acquisition of Wakely Actuarial.

“We were incredibly excited to partner with the Aegis team on this process,” noted Alex Koles, Evolve’s Founder and Managing Director. “This transaction boosts our rising leadership position in the insurance services and technology sectors. Insurance is a vertical of high strategic interest to us and we are proud to have partnered with one of the Upper Midwest’s preeminent insurance service firms.”

Christopher Schaffer, CEO Charles Taylor TPA commented that “Evolve was extremely responsive to our requests and helped structure a highly successful transaction.”

Aegis joins the Charles Taylor team of more than 3,000 professionals around the world. Aegis’ clients will have access to Charles Taylor’s full suite of global claims, insurance management, and technology solutions. Charles Taylor is a portfolio company of [Lovell Minnick Partners](#), a leading private equity fund focused on financial services.

### About Evolve Capital Partners

Evolve Capital Partners is a specialized investment bank focused on businesses serving industries at the intersection of finance and technology, with insurance being one of the core focus verticals. Evolve’s team of dedicated advisors are focused on evolving industries, supporting sustainable growth through transformational M&A transactions.