

## Best of the Middle Market, Private Equity, Featured Dealmaker: Jeffrey Poss, Willkie



*The co-chairman of the firm's private equity group and nominee for The Deal's middle-market PE adviser of the year has guided some of the firm's most active acquirers on countless deals.*

**By Deal Staff** | Published: July 23rd, 2020

For nearly three decades, private equity firms have looked to Willkie Farr & Gallagher LLP's Jeffrey Poss for legal advice on a range of transactions across multiple industries, including the fast-growing financial services, fintech, insurtech and technology sectors.

As co-chairman of Willkie's Private Equity Practice and member of the firm's Executive Committee, Poss leads a cross-border, multidisciplinary group of 300+ attorneys in 12 market centers across the U.S. and Europe. He is a go-to adviser for many of Willkie's longtime clients including Aquiline Capital Partners LLC, Genstar Capital LLC and Warburg Pincus LLC, as well as their portfolio companies. He was also instrumental in the opening of Willkie's offices in Palo Alto, Calif., in December 2018 and San Francisco in September 2019, furthering the continued growth of the firm's fintech and technology work. He is a nominee for private equity dealmaker of the year for The Deal's Middle Market Awards.

Poss advises companies in all phases of their business lifecycle as evidenced by his 2019 deal sheet, which included more than 50 deals in the upper middle market. Most recently, in two notable deals announced in June, he led digital wealth management company Personal Capital in its acquisition by Empower Retirement and investment management company Brinker Capital in its merger with Orion Advisor Solutions.

In 2019, middle-market deal highlights included leading a Willkie team that advised Genstar on the recapitalization and acquisition of an equity stake in registered investment adviser Mercer Advisors Inc. by Oak Hill Capital Partners LP, demonstrating private equity's interest in the independent advisory market. He also represented Genstar in its acquisition of a majority stake in automotive software company OEConnection LLC from Providence Equity Partners LLC, and he advised private equity-owned Virtus Partners in its sale to FIS.

Aquiline Capital is also another longtime client of Jeff's. Among the 2019 highlights, he steered Aquiline in its July acquisition of CoAdvantage Holdings Inc., which provides human resource software for the middle market, from Morgan Stanley Capital Partners.

In May he advised Aquiline portfolio company Covius Holdings Inc., which provides tech solutions to lenders and other types of financial services, in a strategic investment by mortgage REIT New Residential Investment Corp. Soon after, he led a Willkie team advising Covius on its acquisition of a variety of businesses including insurance, tax verification and homeowners association tracking units, among others, from mortgage solutions provider Chronos Solutions LLC.

The Covius deal was just one of a number of add-ons for Poss, Willkie and Aquiline. In February, he also led a Willkie team for Aquiline in its acquisition of Relation Insurance Inc. from Parthenon Capital Partners LP and Century Equity Partners LLC.

Mandates for Genstar and Aquiline overlapped in 2019 on an influential deal in the financial services industry when the two agreed to sell a stake in Dresher, Pa.-based Ascensus LLC to new investors, led by Atlas Merchant Capital LLC and GIC Pte. Ltd.

A Boston University School of Law and University of Pennsylvania graduate, Poss joined Willkie in 1991 and has been with the firm since, working mainly out of New York with a two year stint in the firm's London office.

He is co-chair of the firm's PE practice with Neil Townsend.