

Haynes Boone Advises iJoin in Sale to Broadridge

September 10, 2025 Daniel Malone, Joshua Reisman, Daniel Dubyak, Ethan Moore

PRACTICES Mergers and Acquisitions, Private Equity, Technology Mergers and Acquisitions

Haynes Boone advised iJoin, a leading provider of retirement planning technologies, in its sale to an affiliate of Broadridge Financial Solutions (NYSE: BR), a global Fintech leader serving the wealth, asset management and capital markets sectors.

Mergers and Acquisitions Co-Chair [Dan Malone](#) led the Haynes Boone deal team with support from Associates [Josh Reisman](#), [Daniel Dubyak](#) and [Ethan Moore](#).

"iJoin was founded on the belief that retirement should be more personal for everyone. Our mission has always been to help record keepers, plan advisors, and plan sponsors connect participants to highly personalized, goal-based solutions that lead to better outcomes," said iJoin CEO Steve McCoy [in a statement](#). "Partnering with Broadridge takes that mission to the next level. Their scale and trusted relationships create new opportunities to accelerate innovation, broaden our reach, and deliver greater value to clients and participants."

The Haynes Boone deal team included nationwide, cross-functional support, including:

- Tax Partner [Don Shiman](#) and Associate [Annie Lawson](#)
- Employee Benefits Partner [Scott Thompson](#) and Associate [Courtney Benedict](#)
- Labor and Employment Partner [Raquel Alvarenga](#) and Associate [Kensey Kirby](#)
- Intellectual Property Partner [Gavin George](#) and Associate [Sam Genovese](#)
- Regulatory Compliance Partner [Madelyn Calabrese](#) and Associate [Timothy Piscatelli](#)

Haynes Boone's [M&A Practice Group](#) has comprehensive experience handling middle-market deals, having helped clients close more than 500 transactions in the last five years, with an aggregate value exceeding \$50 billion. The firm routinely represents private equity firms, closely held corporations, founders, large financial institutions and Fortune 500 public companies.