Haynes Boone Wins Top 2 D CEO Deal of the Year Awards

By Daniel P. Malone, Jr., Joshua C. Reisman, Jennifer T. Wisinski, Zach Burnett, Cameron L. Scales, Stephen Grant | May 3, 2024

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D CEO and the Association for Corporate Growth Dallas/Fort Worth recognized Haynes Boone in both their $260-999 million and $1 billion+ Deal of the Year categories at Thursday's 11th Annual Mergers & Acquisitions Awards. The event recognized the top acquisitions, dispositions and other financial transactions of 2023 as well as the dealmakers who made them happen.
They named the $1.2 billion take-private sale of Avantax, Inc. to Cetera Financial Group, Inc. as their Deal of the Year in the $1B+ category.

A Denver-based Haynes Boone team led by Mergers and Acquisitions Co-Chair and Denver Office Managing Partner Dan Malone and assisted by Associate Joshua Reisman advised Dallas-headquartered Avantax in an all-cash transaction involving 3,078 financial professionals representing $83.8B in assets under administration and $42.6B in assets under management. The full-service team also featured assistance from nearly 20 other Texas- and New York-based Haynes Boone lawyers across seven practice groups, including tax, employee benefits and executive compensation, labor and employment, intellectual property, finance and insurance recovery.

Joining Malone and members of the firm's deal team to accept the award were Avantax Chief Accounting Officer Stacy Murray and Ascensus Chief Financial Officer Marc Mehlman, both of whom were instrumental in the transaction as well as the firm's phenomenally successful yearslong partnership with Avantax (formerly Blucora). Other defining transactions of the collaboration included Avantax's $720 million sale of TaxAct, Inc. to Cinven, Ltd., along with its $175 million acquisition of HK Financial Services in 2020 and $180 million acquisition of 1st Global Inc. in 2019.

"It's been an honor to partner with Avantax over the years," said Malone, when the sale was announced in September. "I've had the privilege of witnessing its evolution and success, and I thank the board and executive leadership for trusting me, as well as the entire team at Haynes Boone as their partner all this time."

The firm also won in the $250-999 million category for its work representing Park Cities Asset Management in its acquisition of Elevate Credit, Inc., a leading tech-enabled provider of innovative and responsible online credit solutions for non-prime consumers.

Haynes Boone Partners Jennifer Wisinski and Stephen Grant led the deal team along with Associates Zach Burnett, Cameron Scales and Morgan Smith.

This Deal of the Year honors cap a series of awards that followed the closing of the take-private sale, including when Global M&A Network named Malone a Top-50 Americas Dealmaker and also awarded Haynes Boone the Global Private Equity M&A Deal of the Year (Large Market) for Avantax's $720M prior sale.

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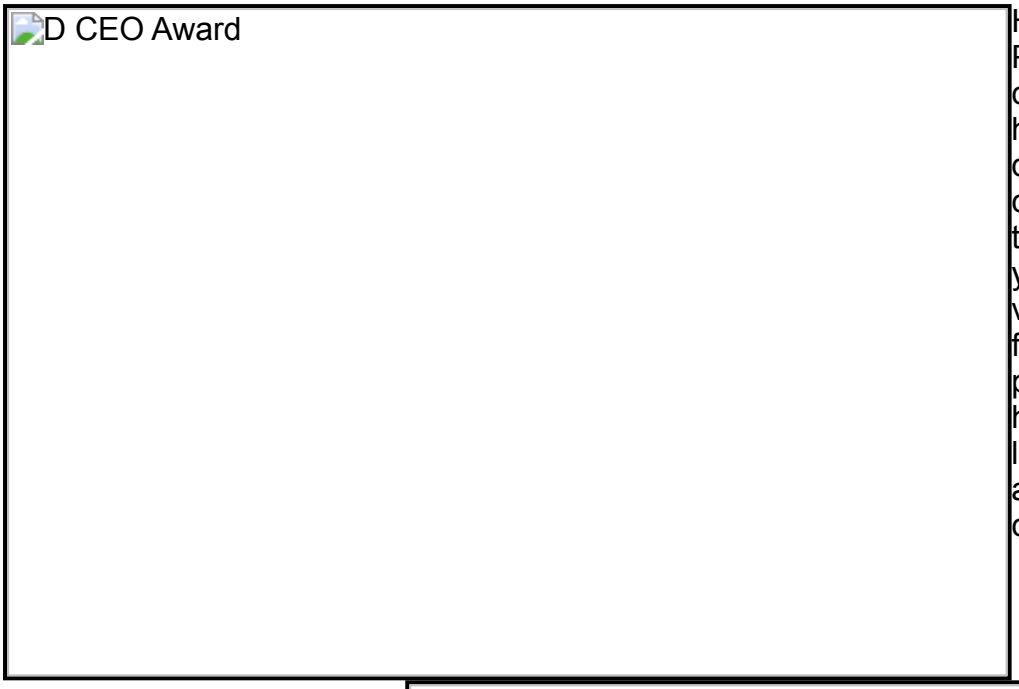
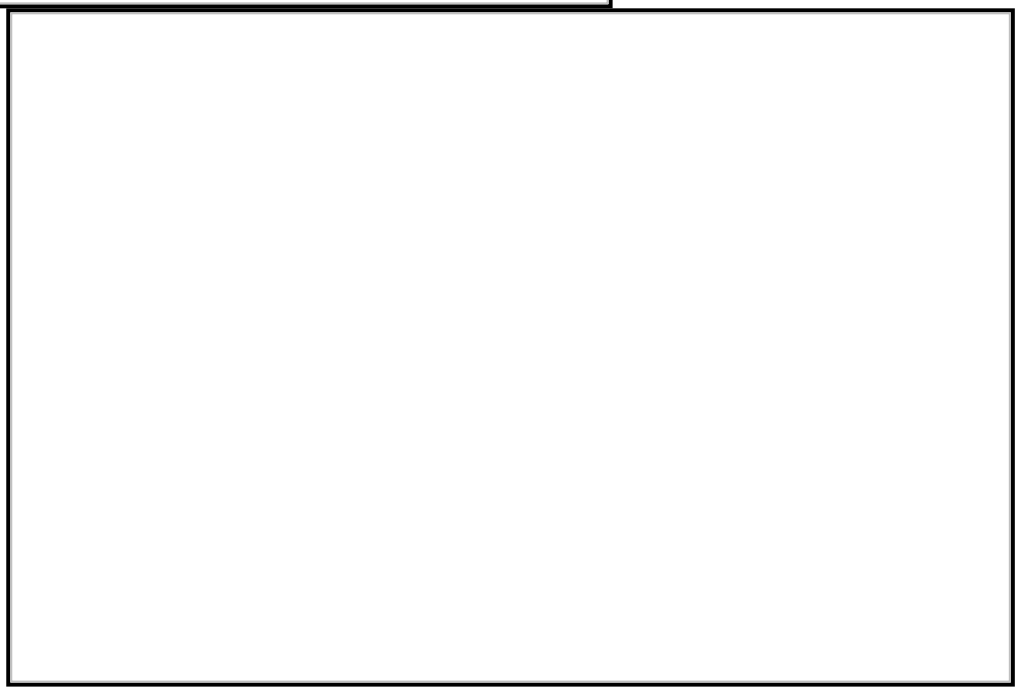


Haynes Boone's M&A Practice Group has comprehensive experience handling middle-market deals, having helped clients close more than 500 transactions in the last five years, with an aggregate value exceeding $50B. The firm routinely represents private equity firms, closely held corporations, founders,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



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