M&A Advisor Selects Haynes and Boone Teams for Deals of Year

By Kenneth K. Bezozo, Don Shiman, Lauren White, Daniel P. Malone, Jr., Madelyn Calabrese, Daren R. Domina, Paul H. Amiel, Sakina Rasheed Foster, Laura Shapiro | November 21, 2019

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Two Haynes Boone deal teams received M&A Advisor Deal of the Year awards during the 2019 M&A Advisor Summit on Nov. 19 in New York. The annual invitation-only conference drew more than 500 thought leaders from various industries.

Haynes Boone was recognized for the following deals:

Blucora Inc.

A Haynes Boone team represented Blucora Inc. in its acquisition of 1st Global Inc., a tax-focused wealth management company based in Dallas, for $180 million. The deal was named Technology Deal of the Year ($100 million - $250 million) during the M&A Advisor summit.

The deal brings together two leaders in the tax-focused wealth management space. The complementary nature of the companies' business models creates numerous synergies and growth opportunities. 1st Global, the No. 2 tax-focused independent broker-dealer based on total revenue, specializes in servicing large, multi-partner accounting firms, while HD Vest focuses primarily on converting individual tax preparers into wealth advisors.

Haynes Boone Dallas Partner Jan Sharry led the team representing Blucora in the transaction. She was assisted by Partners Ryan Cox and Dan P. Malone Jr. and Associates Michael Pritchard, David Lightstone and Omar Shariff. New York Partners Madelyn Calabrese and Daren Domina are advising Blucora on regulatory issues. Partners Paul Amiel and Sakina Foster and Associate Laura Shapiro advised the client on financing for the transaction.

DW Healthcare Partners

The DW Healthcare Partners' deal team received an outstanding achievement award for Private Equity Deal of the Year ($75 million - $100 million). The Haynes Boone deal team was led by Partner Blaine Statham, with significant contributions from Partner Ken Bezozo, Associates Chase Proctor, Catherine Cope, Brett Moore and Don Shiman, and Counsel Lauren White. The team represented a product development, custom designer, and manufacturer of medical-related containers and packaging solutions company in the sale of a majority of its equity.

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 $40 billion. The firm routinely represents private equity firms, closely held corporations, founders, large financial institutions and Fortune 500 public companies. The M&A team prides itself on crafting strategic solutions that advance clients' business objectives by anticipating and evaluating the roadblocks and opportunities that clients face on the way to closing a deal successfully.

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