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## NEWS RELEASE

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*For Immediate Release*

### **SAGEVIEW ENGAGES IN STRATEGIC PARTNERSHIP WITH INVESTMENT FROM AQUILINE CAPITAL PARTNERS**

NEWPORT BEACH (January 5, 2021) – SageView Advisory Group (“SageView”), a trusted advisor in retirement planning and wealth management, today announced a strategic investment from Aquiline Capital Partners. Randy Long, SageView Founder and Managing Principal, and Jon Upham, Principal, will retain a significant equity stake and continue to lead the firm.

“This investment provides us with the capital for continued growth in the institutional retirement and wealth management arenas, as well as expanded ownership among our advisors and key associates at SageView,” said Randy Long. “We have created a unique culture that is of great value to us, which made Aquiline the right choice for a capital partner. Aquiline shares in our vision for the future and is committed to independence, our people and technology. Partnering with Aquiline will help us better serve our clients and grow our business for the long-term.”

“The retirement plan consulting industry has continued to transform over recent years, and we have seen incredible opportunities arise. This partnership with Aquiline will help to drive further growth and will benefit our firm and clients. We could not be more excited for the future of SageView,” added Jon Upham.

SageView has over 100 employees and 25 offices in 17 states, with more than \$119 billion in assets under advisement as of September 30, 2020. A large number of SageView’s employees will become equity holders as part of this partnership.

Jeff Greenberg, Chairman and Chief Executive Officer of Aquiline Capital Partners, said: “We welcome the opportunity to partner with Randy and Jon and their colleagues as they continue to build SageView, one of the leading retirement-focused RIAs in a consolidating industry. We see a substantial opportunity for SageView to serve its clients as wealth management and retirement services converge, and to expand its financial wellness offering.”

Jefferies served as exclusive financial advisor and Burr Forman, LLP served as legal counsel to SageView during the process.

Ardea Partners LP served as exclusive financial advisor to Aquiline. Willkie Farr & Gallagher LLP served as legal counsel to Aquiline during the process. Wise Rhino also advised Aquiline.

#### **About SageView Advisory Group**

*SageView Advisory Group is an SEC Registered Investment Advisory firm (RIA) serving retirement plan sponsors and individuals throughout the United States since 1989. SageView advises on 401(k), 403(b), 457, defined benefit and deferred compensation plans. SageView is headquartered in Newport Beach, California with 25 offices nationwide.*

*SageView Advisory Group, LLC is a Registered Investment Advisor. Advisory services are only offered to clients or prospective clients where SageView Advisory Group, LLC and its representatives are properly licensed or exempt from licensure. Past performance is no guarantee of future results. No advice may be rendered by SageView Advisory Group, LLC unless a client service agreement is in place.*

*For more information about SageView, visit [www.sageviewadvisory.com](http://www.sageviewadvisory.com) or call (800) 814-8742.*

**About Aquiline Capital Partners LLC**

*Aquiline Capital Partners, founded in 2005, is a private investment firm based in New York and London investing in businesses across the financial services sector in financial technology, insurance, investment management, business services, credit and healthcare. The firm has \$5.3 billion in assets under management as of December 31, 2019.*

*For more information about Aquiline, its investment professionals, and its portfolio companies, please visit: [www.aquiline.com](http://www.aquiline.com).*