Atlantic Management Company, Inc. Provides Financial Advisory Services For Midland Financial Corp. Transaction

Midland Financial Corp is pleased to announce its acquisition by Equity Trust

Leading provider of premier custodial services specializing in self-directed retirement accounts, IRC §1031 exchanges, and private fund custody services.

PORTSMOUTH, NEW HAMPSHIRE, UNITED STATES, October 6, 2023 /EINPresswire.com/ -- Equity Trust Company, a leading self-directed IRA custodian, has announced its acquisition of Midland Financial Corp., a prominent self-directed IRA firm based in Fort Myers, Florida. Atlantic Management Company, Inc. provided financial advisory and transaction support services, ensuring a smooth and successful acquisition process.

Equity Trust is a trusted partner for individuals seeking to self-direct their retirement investments, offering access to a wide range of investment options such as real estate, private equity, and precious metals.

Established in 1994, the Midland family of companies stands as a premier custodial services provider in the U.S., specializing in self-directed retirement accounts, IRC §1031 exchanges, and private fund custody services. Operating under the umbrella of Midland Financial Corp., the enterprise boasts two primary subsidiaries: Midland Trust Company, a South Dakota trust entity, and Midland IRA, Inc., a Florida corporation. At the heart of Midland's operations is a commitment to unparalleled responsiveness in the sector, underscored by their provision of dedicated personal service representatives for each client and a drive for operational efficiency throughout the organization. With this acquisition, Equity Trust will leverage the combined expertise and resources of both organizations to offer clients enhanced services and support.

Brady Finney, Managing Director at Atlantic Management Company, noted, “Our collaboration with the exceptional team at Midland has been a rewarding experience. It's been an honor to work alongside such dedicated professionals, and we're proud of the role we played in this pivotal transaction.”

"Our clients will benefit greatly from this partnership," said Dave Owens, CEO of Midland. "Equity Trust's extensive resources will provide additional opportunities for our employees and allow us to provide an even better experience and more robust solutions to our valued customers. We are excited about the possibilities that lie ahead."

Atlantic Management Company is a leading valuation and financial advisory firm serving the business, legal and financial communities.

The transaction brings together two trusted brands, known for their commitment to innovation, professionalism, and excellent customer service. "We are thrilled to welcome Midland Trust's clients and employees to the Equity Trust family," said George Sullivan, CEO of Equity Trust. "This acquisition aligns perfectly with our strategy to provide the highest-quality products and services to our customers while enabling them to maximize their retirement savings. We are excited to join forces with the talented, customer-focused employees of Midland to deliver a world-class experience."

> Having a partner like Atlantic Management Company for the support of our ESOP was instrumental in the successful completion of this transaction."
>
> *Dave Owens, Chief Executive Officer*

Midland Trust has built a strong reputation for its comprehensive self-directed IRA custodial services, serving a diverse client base across the U.S. Its experienced team and commitment to exceptional service align seamlessly with Equity Trust's core values, making this acquisition a natural fit. This acquisition will further expand Equity Trust's capabilities, enabling clients to have even more flexibility and control over their retirement savings.

"Midland's legacy of dedication to its clients and operational excellence is evident in every facet of its business. This recent transition underscores Midland's commitment to its employees and clients. Having a partner like Atlantic Management Company for the support of our ESOP was instrumental in the successful completion of this transaction," said Dave Owens.

About Atlantic Management Company
Founded in 1968, Atlantic Management Company, Inc. is a leading financial and transaction advisory firm that provides business valuation, ESOP, and merger and acquisition services for

privately owned middle market companies from its offices in Portsmouth, New Hampshire, and New Orleans, LA.

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