

## FOR IMMEDIATE RELEASE

### **EATON PARTNERS ACTS AS EXCLUSIVE FINANCIAL ADVISOR TO ESTANCIA CAPITAL PARTNERS ON SINGLE-ASSET CONTINUATION VEHICLE FOR R&T DEPOSIT SOLUTIONS**

**STAMFORD, Conn., April 24, 2025** – Eaton Partners is pleased to have acted as the exclusive financial advisor to Estancia Capital Management, LLC, a Philadelphia and Scottsdale based middle-market private equity firm, on a single-asset continuation vehicle for R&T Deposit Solutions, the second largest deposit sweep administrator in the U.S.

The transaction enabled Estancia to retain its ownership of R&T while providing additional duration and follow-on capital to support the company's next phase of growth. Key investors in the transaction include Barings, Kline Hill Partners, J.P. Morgan, and rollover Estancia investors.

“We are proud that our Private Capital Advisory team could showcase Stifel’s integrated platform, in partnership with our KBW colleagues, and we are grateful to Estancia for trusting us in supporting this important milestone,” said Adrian Siew, Managing Director and Co-Head of GP-Solutions at Eaton. KBW, also a Stifel company, acted as the sell-side advisor to R&T in late 2023 in which Estancia sold a meaningful stake in the company to GTCR, the Chicago-based private equity firm.

“We are pleased to have collaborated with the Stifel team, whose product and industry expertise were vital to the success of this transaction,” said Takashi Moriuchi, Managing Director and Co-Founder of Estancia.

#### **About Eaton Partners**

Eaton Partners, a Stifel Company, is one of the world’s largest capital placement agents and fund advisory firms, having raised more than \$140 billion across more than 190 highly differentiated alternative investment funds and offerings. Founded in 1983, Eaton advises and raises institutional capital for investment managers across alternative strategies – private equity, private credit, real assets, real estate, and hedge funds/public market – in both the primary and secondary markets. Eaton Partners maintains offices and operates throughout North America, Europe, and Asia.

Eaton Partners is a division of Stifel, Nicolaus & Company, Incorporated, Member SIPC and NYSE. Eaton Partners subsidiary Eaton Partners (UK) LLP is authorized and regulated by the Financial Conduct Authority (FCA). Eaton Partners subsidiary Stifel Hong Kong Limited, doing business as Eaton Partners Hong Kong, is approved as a Type 1-licensed company under the Securities and Futures Commission (SFC) in Hong Kong. Eaton Partners and the Eaton Partners logo are trademarks of Eaton Partners, LLC, a limited liability company. © Eaton Partners, 2025. For more information, please visit <https://eaton-partners.com/>.

#### **Stifel Company Information**

Stifel Financial Corp. (NYSE: SF) is a financial services holding company headquartered in St. Louis, Missouri, that conducts its banking, securities, and financial services business through several wholly owned subsidiaries. Stifel’s broker-dealer clients are served in the United States through Stifel, Nicolaus & Company, Incorporated, including its Eaton Partners and Miller Buckfire business divisions; Keefe, Bruyette & Woods, Inc.; and Stifel Independent Advisors, LLC; in Canada through Stifel Nicolaus Canada Inc.; and in the United Kingdom and Europe through Stifel Nicolaus Europe Limited. The Company’s broker-dealer affiliates provide securities brokerage, investment banking, trading, investment advisory, and related financial services to individual investors, professional money managers, businesses, and municipalities. Stifel Bank and Stifel Bank & Trust offer a full range of consumer and commercial lending solutions. Stifel Trust Company, N.A. and Stifel Trust Company Delaware, N.A. offer trust and related services. To learn more about Stifel, please visit the Company’s website at [www.stifel.com](http://www.stifel.com). For global disclosures, please visit <https://www.stifel.com/investor-relations/press-releases>.

### **Media Contacts**

Neil Shapiro, (212) 271-3447

[shapiron@stifel.com](mailto:shapiron@stifel.com)

Alex Hamer, 212.847.6673

[hameral@stifel.com](mailto:hameral@stifel.com)