



**Dynasty Served as Exclusive Financial Advisor
to Abacus Global Management, Inc. (NYSE: ABX)
on Its Minority Equity Investment in \$18 Billion
Manning & Napier**

March 2026



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Served as Exclusive Financial Advisor to



Announced a Minority Equity Investment in



March 2026

Transaction Details

- On March 12, Abacus Global Management, Inc. (NYSE: ABX), (“Abacus”), a leading financial services company specializing in longevity-based assets and data-driven wealth solutions, entered into a definitive agreement to acquire a \$53 million minority equity stake in Manning & Napier, Inc. (“M&N”)
- The investment accelerates ABX’s evolution from a life solutions originator to a fully integrated, alternative asset management platform, unlocking new distribution channels and driving fee-related earnings growth
- In connection with the closing of the equity investment, the parties will enter into a Strategic Alliance Agreement (“SAA”) encompassing three pillars: Product Distribution Partnership, Lead Generation & Referral Engine and Joint Product Development

Overview of Abacus

- Abacus Global Management (NYSE: ABX) is a vertically integrated alternative asset manager headquartered in Orlando, FL specializing in longevity-based assets, actuarial technology and personalized financial planning
- The company operates across four divisions: Abacus Life Solutions (policy origination), Abacus Asset Group (fund management), ABL Tech (mortality verification and data analytics) and Abacus Wealth Advisors (wealth management and RIA platform)

Overview of Manning & Napier

- Founded in 1970, Manning & Napier is a diversified wealth and asset management firm with approximately \$18 billion in total assets under management (“AUM”), comprising approximately \$8 billion in wealth management AUM and \$10 billion in asset management AUM
- The firm serves approximately 3,400 clients with an average client balance of \$5 million and employs more than 200 professionals

Strategic Rationale



“This investment represents a defining moment in Abacus’s evolution from a life solutions originator to a fully integrated, longevity-focused alternative asset management platform. Manning & Napier brings a proven wealth advisory platform with approximately 3,400 clients, \$18 billion in AUM, and more than 50 years of trusted investment management.

Combined with our proprietary LifeARC data and actuarial capabilities, this partnership completes the Abacus flywheel, connecting our Life Solutions origination engine, our growing Asset Group, and now a dedicated wealth distribution channel. We are not just acquiring a minority stake; we are building a longevity-focused wealth ecosystem that we believe will generate significant value for our shareholders”

– Jay Jackson, CEO at Abacus



“We are excited to welcome Abacus as a minority equity partner of Manning & Napier. Abacus’ strategic capital investment positions us to deliver meaningful benefits for our clients, advisor partners, and employees. This partnership further validates our strategic vision for Manning & Napier, with a continued focus on providing superior investment solutions and exceptional planning tools and technology to deliver on our commitments to clients.”

– Paul Battaglia, President and CFO at Manning & Napier



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