



Erik Records

Managing Director, M&A
(Insurance & Wealth Management)
C-Suite IMPACT Deal Makers

About Erik

With over 20 years of experience in M&A, Erik Records has worked with leading executive teams, private equity groups, and strategic acquirers to craft and execute acquisition and divestment strategies. His background in insurance (Gallagher, NYSE, AJG) has helped organizations in sectors like P&C, Benefits, Wealth Management, and HR Consulting make their next strategic moves. Erik has completed 75+ transactions, with aggregate sales exceeding \$1.5B, across industries including manufacturing, retail, and services.

Erik's expertise lies in creating acquisition strategies, financial modeling, deal negotiation, and integration. He has a proven track record of guiding companies through both buy-side and sell-side strategies, developing proprietary acquisition databases, and performing due diligence. "I wake up ready to add another chapter and help others achieve their business goals," he says, reflecting on his passion for M&A and continual learning across diverse industries.

Highlights

- Ran buy-side M&A for 20+ years with numerous corporate acquirers and private equity groups
- VP of Mergers for Gallagher, one of the largest insurance brokers in the world
- MBA Pepperdine University
- B.S. Finance, Real Estate & Law Cal Poly Pomona
- Experienced start-up entrepreneur: Buttonwood Capital, Myers Capital Partners, and GPC (now a Home Depot company)

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