

DEALMAKERS OF THE YEAR FINALIST



What were some of your most satisfying successes of the past year, and why?

I am particularly proud that this has been a standout year for our group even in the midst of uncertainty in the global markets. *S&P Global* reported that we were a top ranked firm in the insurance industry by deal count globally in 2024 and the first quarter of 2025. *Mergermarket* reported that we were a top ranked firm for financial services/insurance M&A by deal value when representing principal advisers globally for the first three quarters of 2024.

Some of my most successful matters this past year include advising on several landmark transactions that set new industry benchmarks. Our team helped guide Global Atlantic through the largest long-term care

ELENA M. COYLE

SKADDEN, ARPS, SLATE, MEAGHER & FLOM

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reinsurance deal in history, a complex cross-border transaction involving both U.S. and Japanese businesses. We also played a key role in Zurich Insurance Group's acquisition of AIG's global travel insurance business, a deal that has significantly expanded Zurich's market presence. Additionally, we represented JAB in its strategic shift deeper into financial services through the pending acquisition of Prosperity Insurance and Prosperity Asset Management, Sixth Street / Talcott in a \$10B variable annuity reinsurance transaction with MetLife, and Bowhead Specialty Holdings in a deal that achieved record-setting results as the largest specialty insurance IPO of 2024. These successes were particularly rewarding not just because they involved innovative structures and considerable cross-border coordination but because they delivered significant strategic value for our clients.

What qualities make a great dealmaker?

Successful dealmakers have the ability to read people and situations, allowing them to adapt with agility as transactions unfold. They approach negotiations without ego, solely focused on shaping outcomes that best serve their client's objectives. They actively listen to both their clients and counterparties, enabling them to craft strategies that are not only effective but also beneficial for all parties involved. Ultimately, the ability to set aside personal pride or agenda and remain focused on client needs is what distinguishes the greatest dealmakers in the field.

What recent market factors have been the most challenging in your practice area?

Persistent market uncertainty and a fluid regulatory environment have presented challenges in planning and executing transactions. Navigating these conditions demands a proactive, flexible approach and a deep understanding of both the legal and commercial landscape.

A prospective client calls and asks why you or your team should be retained. What is your response?

We offer a distinctive combination of deep expertise, creativity, and efficiency, ensuring that every client receives the highest level of service regardless of the size or complexity of the transaction. Our global team and collaborative culture enable us to draw on a wide range of perspectives and resources to deliver solutions that are actionable, commercial and practical, tailored to each client's strategic objectives.