



LOCATION

Chicago Area, IL

REVENUE

\$1,482,893

ASKING

\$4,000,000

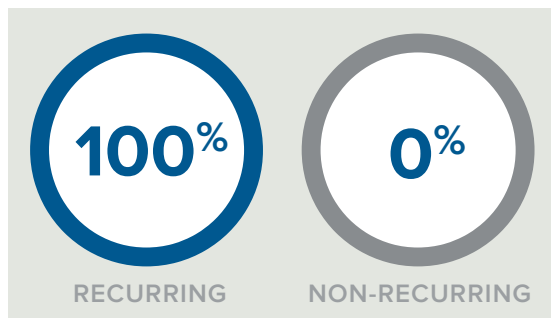
This fee-only RIA in the greater Chicago area provides investment planning and advisory services to high-net worth individuals. This practice is focused on understanding the individualized financial objectives for each of its clients and developing an appropriate course of action to assist each client in achieving their financial goals. With trailing 12 months revenue of \$1,481,743 from managing approximately \$275 million in fee-based assets, this practice would make a great addition to a larger RIA firm seeking to expand its roots in the greater Chicago area. With almost 100 years of combined experience in the wealth management space, the principals of this practice are seasoned professionals with deep connections and well-established referral networks.

The preferred buyer is a fee-only RIA firm that is committed to providing exceptional service to its clients. It is also important that the buyer’s investment philosophy is focused more on portfolios built with individual stocks and bonds and not predominately mutual funds and ETFs. This is a Sell and Stay® opportunity, with the practice’s principals transitioning to retirement over the coming years.

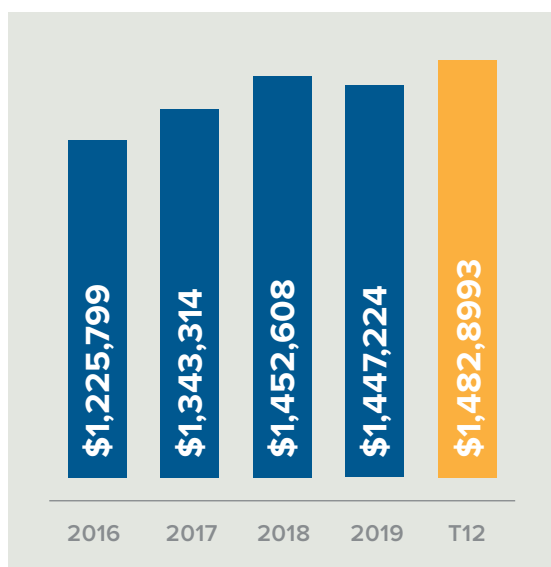
PRACTICE INFORMATION

Assets Under Advisory	\$275,729,017
Assets Under Management	\$275,729,017
Households	108
Form of Ownership	LLC
Total Number of Employees	1
Billing Management Software	Advent APX

REVENUE



HISTORICAL REVENUE



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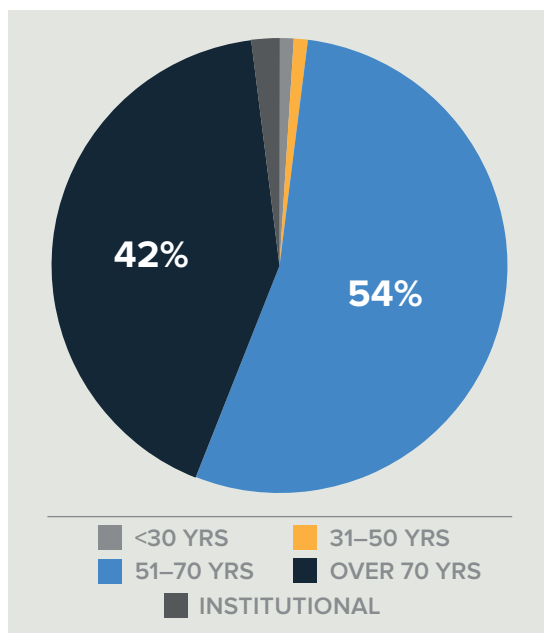
SELLER INFORMATION

Licenses	65
Years in Business	24
Years in Industry	49
Seller's Age Range	60-75

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$1,481,743	
HOURLY-BASED		
Consulting		\$1,150
TOTALS		
	\$1,481,743	\$1,150

CLIENT DEMOGRAPHICS



REVENUE SOURCES

