FP TRANSITIONS®

LISTING 20-303

LOCATION	REVENUE	ASKING
Northwest Philadelphia	$538,593	$1,300,000

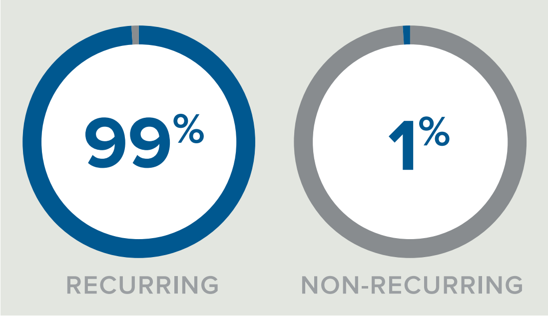
This RIA/RR practice located in the suburbs of Northwest Philadelphia focuses on providing clients with sound, objective financial planning and wealth management. Annual gross revenue is $538,593, 99% of which is recurring—$467,970 from fees on AUM and another $63,664 from variable annuity trails.

With 36 years of experience and a longstanding client base, this practice is well-established and presents a flexible opportunity for firms seeking expansion into the greater Philadelphia area. An ideal buyer would take a similar approach to comprehensive, well-rounded financial planning and wealth management, and have at least one Certified Financial Planner® on staff. One licensed advisor would like to stay with the firm post-closing.

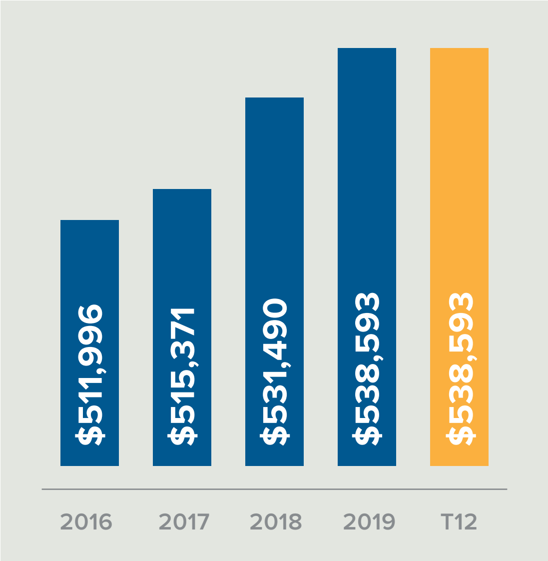
PRACTICE INFORMATION

Assets Under Advisory	$55,847,630
Assets Under Management	$52,888,071
Number of Clients	69
Form of Ownership	LLC
Total Number of Employees	1
Billing Management Software	Orion

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit **fptransitions.com/20-303-inquire**
or log in to your member dashboard to inquire.

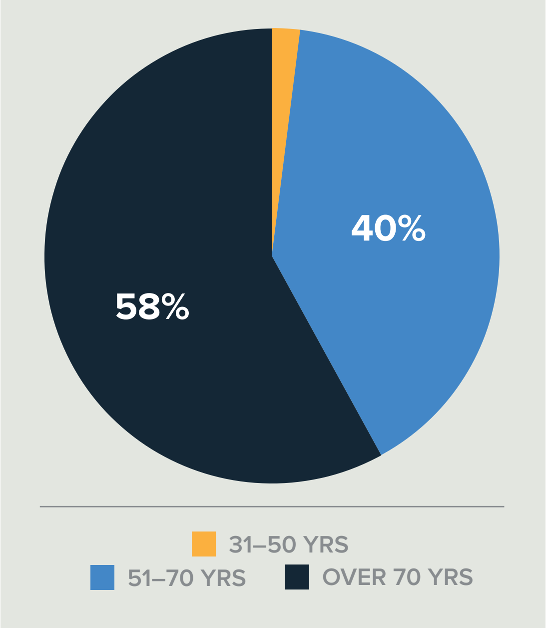
NOT A MEMBER? Create your free membership at **fptransitions.com/membership**.

LOCATION	REVENUE	ASKING
Northwest Philadelphia	$538,593	$1,300,000

SELLER INFORMATION

Licenses	6, 7, 22, 24, 63, 65
Designations	CFP
Education	Bachelor's Degree
Years in Business	36
Years in Industry	36
Seller's Age Range	65–70
Insurance Lines Carried	Life, Health, Disability, LTC

CLIENT DEMOGRAPHICS



SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$467,970	
SECURITIES-BASED		
Variable Annuities	$63,664	
HOURLY-BASED		
Accounting		$4,000
INSURANCE-BASED		
Other		$2,959
TOTALS		
	$531,634	**$6,959**

REVENUE SOURCES