



LOCATION
Western PA

REVENUE
\$248,378

ASKING
\$600,000

This fee-only RIA in Western Pennsylvania, which has been in business for 32 years, serves a loyal client base of 60 made up of individual households, non-profits and companies. The practice’s average client tenure is 17 years. Current annual gross revenue for the practice is \$248,378, of which \$235,778 is recurring revenue from managing approximately \$43 million in assets, with the remaining \$12,600 of revenue from 401(k) plans.

The seller seeks a buyer with a physical presence in the Western Pennsylvania area that is either an RIA or hybrid firm, and that can maintain a traditional, high-touch client service approach, with at least quarterly contact and annual in-person meetings. As a Sell and Stay® opportunity, the principal and two non-licensed employees of the firm would like to stay on post-closing, and would prefer for the buyer to assume the practice’s current office space.

PRACTICE INFORMATION

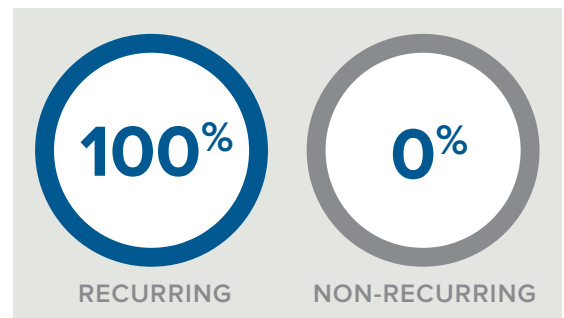
Assets Under Advisory	\$43,600,000
Assets Under Management	\$43,600,000
Households	60
Form of Ownership	S Corporation
Total Number of Employees	2

INQUIRE NOW

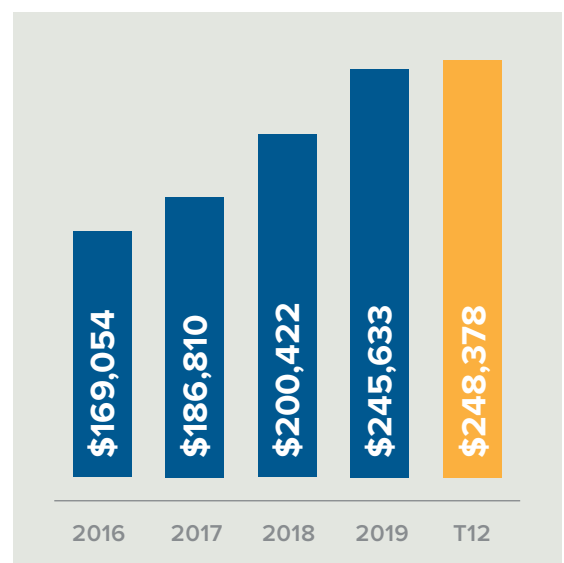
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REVENUE



HISTORICAL REVENUE





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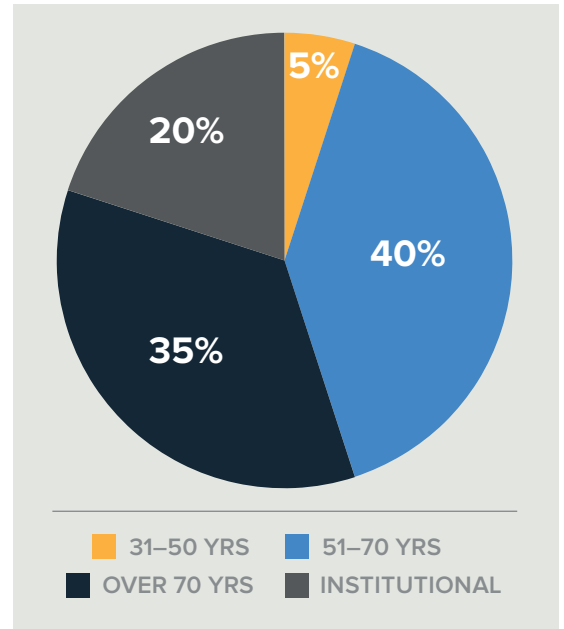
SELLER INFORMATION

Licenses	65
Designations	ChFC
Education	Master's Degree
Years in Business	32
Years in Industry	32
Seller's Age Range	70-75

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$235,778	
401(k) Plans	\$12,600	
TOTALS		
	\$248,378	

CLIENT DEMOGRAPHICS



REVENUE SOURCES

