FP TRANSITIONS®

# LISTING 20-312

| LOCATION | REVENUE | ASKING |
|---|---|---|
| Southern NH | $1,354,327 | $3,600,000 |

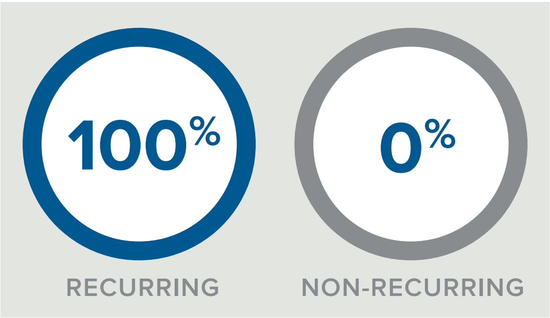
This New Hampshire-based, fee-only RIA is focused on providing individually tailored financial plans and proactive investment management to each of its 177 client households. With trailing 12 months revenue of $1,354,327 from managing approximately $115 million in assets, this practice would make a great addition to a larger RIA seeking to expand its roots in New Hampshire. All portfolio management for the practice's clients is done in-house.

The ideal buyer would be a fee-only RIA firm that is committed to providing exceptional service to its clients and to retaining a physical presence in New Hampshire. Two of the practice's advisors wish to remain with the buyer post-sale. There is an opportunity for the acquiring firm to also purchase the practice's current office space.

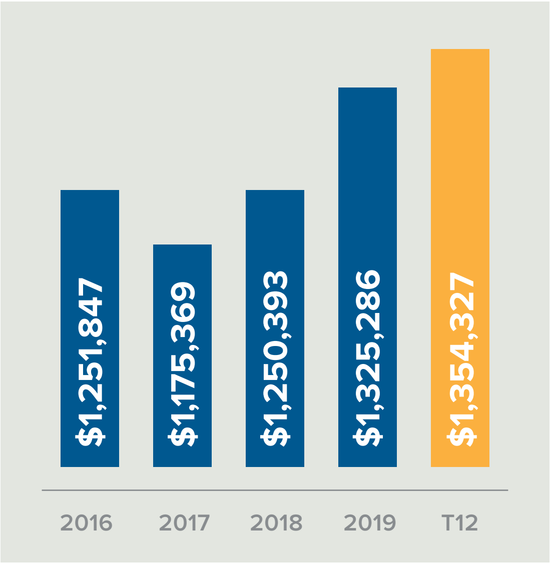
## PRACTICE INFORMATION

| | |
|---|---|
| Assets Under Advisory | $114,822,781 |
| Assets Under Management | $114,300,000 |
| Households | 177 |
| Form of Ownership | LLC |
| Total Number of Employees | 2 |
| Billing Management Software | Orion |

## REVENUE




## HISTORICAL REVENUE




## INQUIRE NOW

Visit **fptransitions.com/20-312-inquire** or log in to your member dashboard to inquire.

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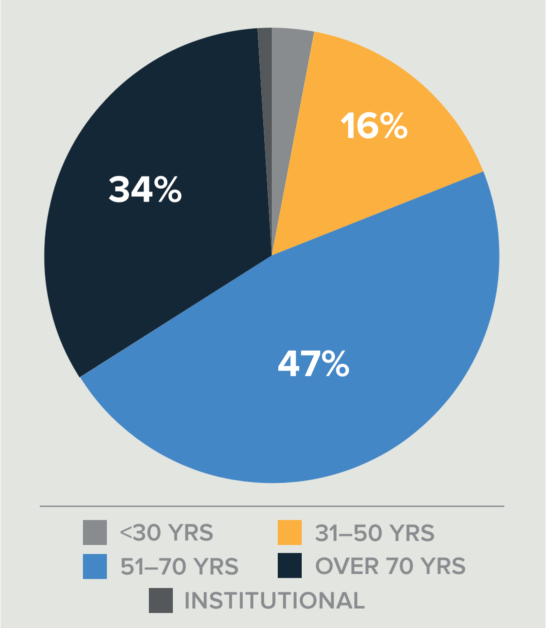
## SELLER INFORMATION

| | |
| --- | --- |
| Licenses | 7, 24, 63, 65, 66 |
| Designations | CDFA |
| Education | PhD, MUP, MA, BA, Bachelor's Degree |
| Years in Business | 9 |
| Years in Industry | 22 |
| Seller's Age Range | 48–67 |
| Insurance Lines Carried | Life, Health, Disability, LTC |

## CLIENT DEMOGRAPHICS




## SOURCES OF REVENUE

| | RECURRING REVENUE | NON-RECURRING REVENUE |
| --- | --- | --- |
| **FEE-BASED** | | |
| Fees from AUM | $1,354,327 | |
| **TOTALS** | | |
| | **$1,354,327** | |

## REVENUE SOURCES