



LOCATION
East Ohio

REVENUE
\$588,638

ASKING
\$1,400,000

This RIA practice located in East Ohio provides its clients with family office-style service focusing on holistic financial planning and portfolio management. Trailing 12 months' gross revenue for this practice is over \$585,000, of which 99% is recurring revenue from fees on approximately \$30 million in assets. This practice would make a great addition to a larger firm seeking to establish or expand its presence in East Ohio.

The preferred buyer would be a well-established firm focused on holistic financial planning and portfolio management willing to retain the practice's two licensed producers and three support staff and the practice's current office location.

PRACTICE INFORMATION

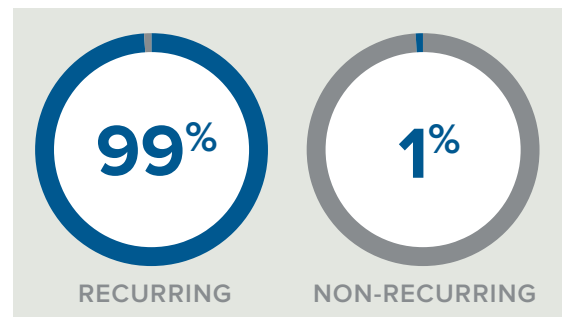
Assets Under Advisory	\$53,000,000
Assets Under Management	\$30,350,739
Households	57
Form of Ownership	C Corporation
Total Number of Employees	5
Billing Management Software	QuickBooks®

INQUIRE NOW

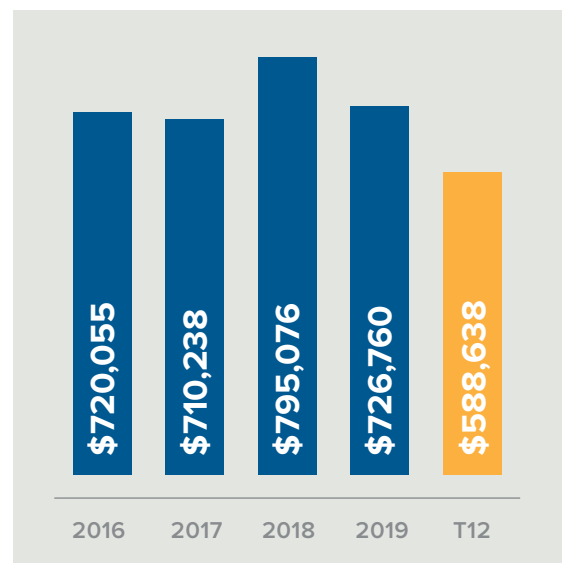
Visit fptransitions.com/20-320-inquire or log in to your member dashboard to inquire.

Not a member? Create your free membership at fptransitions.com/membership.

REVENUE



HISTORICAL REVENUE





LOCATION
East Ohio

REVENUE
\$588,638

ASKING
\$1,400,000

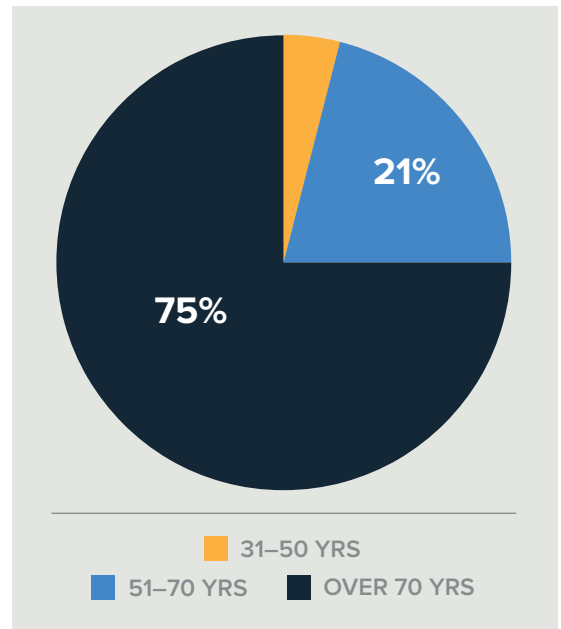
SELLER INFORMATION

Licenses	65
Designations	CExP, CEP
Education	Associate's Degree
Years in Business	48
Years in Industry	51
Seller's Age Range	70-75
Insurance Lines Carried	Life, Health, Annuities

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$582,067	
INSURANCE-BASED		
Other		\$6,571
TOTALS		
	\$582,067	\$6,571

CLIENT DEMOGRAPHICS



REVENUE SOURCES

