



LOCATION
Philadelphia Area

REVENUE
\$580,000

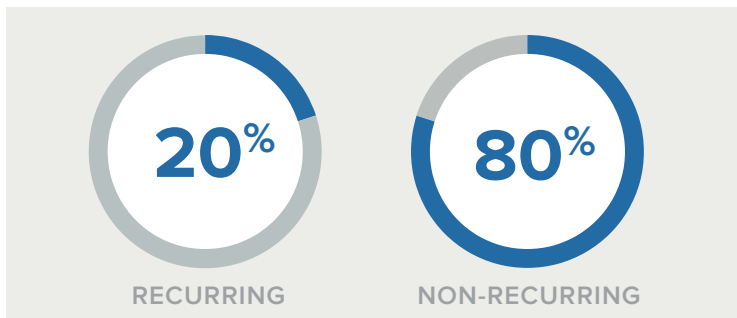
ASKING
\$825,000

This practice located in an affluent suburb of Philadelphia focuses on providing clients with tactical portfolio design and management. With approximately 65% of its client base under the age of 50 and a strong referral network of local doctors, dentists, pharmacists, and small business owners, this practice has great growth potential. The current annual gross revenue for this practice is approximately \$580,000, \$115,000 of which is recurring revenue with the remainder from non-recurring commissions predominately from stocks.

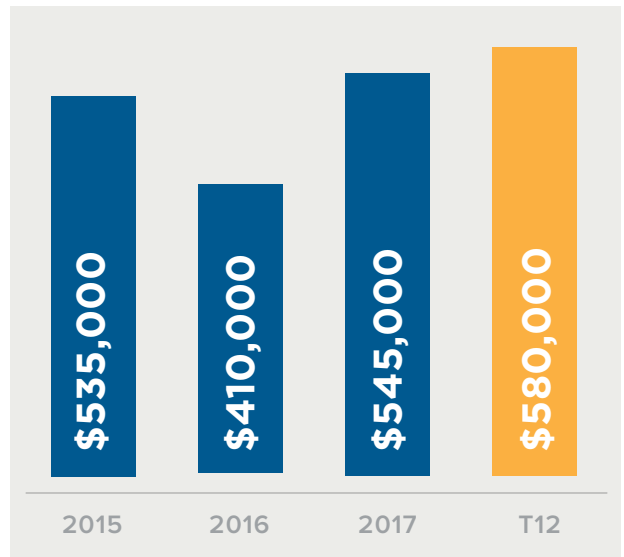
The preferred buyer would be a well-established, full-service RIA firm with experience in converting client assets into fee-based accounts. The seller also prefers a buyer who has at least one staff member with the Certified Financial Planner® designation.

Price: \$825,000 Terms: Minimum of 30% down with the balance seller financed

REVENUE



GROSS REVENUE



PRACTICE INFORMATION

Assets Under Management	\$57,000,000
Assets Under Advisory	\$3,000,000
Form of Ownership	Sole Proprietorship
Total # of Employees	1
<i>Licensed Employees</i>	1
Number of Branch Offices	1
Errors & Omission Insurance?	Yes
% of Overhead / Expenses	3%

INQUIRE NOW

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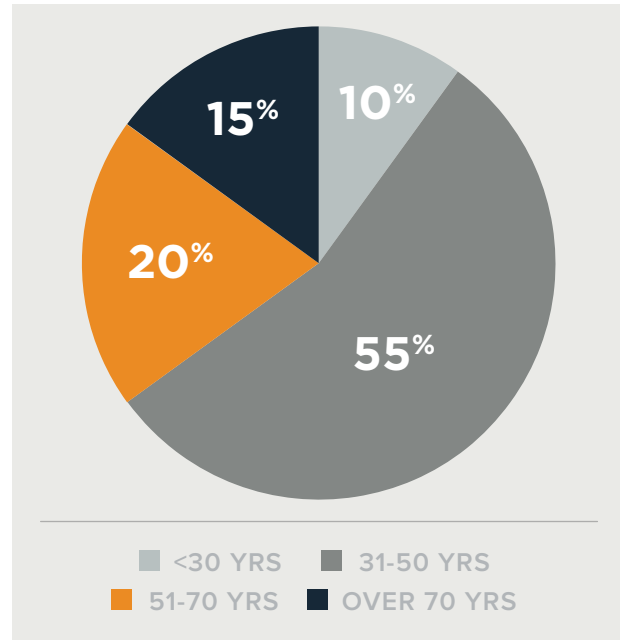
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SELLER INFORMATION

Licenses	7, 63
Education	Bachelor's Degree
Years in Business	9
Years in Industry	19
Seller's Age Range	40-50
Currently Licensed?	Yes

CLIENT DEMOGRAPHICS



SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
401K Plans	\$30,000	
SECURITIES-BASED		
Stocks		\$425,000
Mutual Funds	\$85,000	\$40,000
TOTALS		
	\$115,000	\$465,000

REVENUE SOURCES

