FP TRANSITIONS®

LISTING 18-243

LOCATION	REVENUE	ASKING
Northwest Chicago Suburb	$2,614,474	$6,275,000

Located in a charming suburb northwest of Chicago, IL, this RR/IAR practice prides itself on being proactive to ensure clients are minimizing risks while still achieving their financial goals. Started over 20 years ago, the cornerstone of this practice is its trusted team of financial advisors and support staff that provide expert guidance to clients and assist them with navigating life's planned and unplanned events. With annual gross revenue exceeding $2.6 million, approximately $2.2 million of which is from $179 million in fee-based assets, this practice would make a great addition to a firm seeking to establish or expand in the Chicago area.

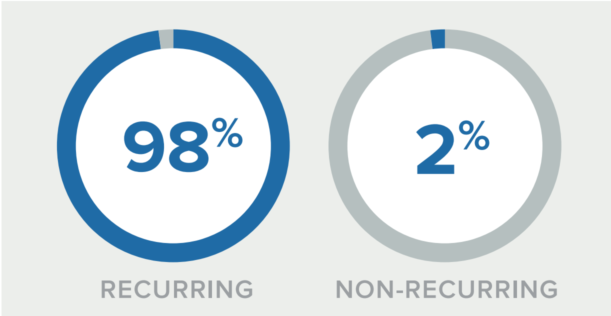
The preferred buyer is a well-established hybrid RIA willing to retain the seller's current staff and office space. The seller also prefers a technologically savvy buyer.

Price: $6,275,000

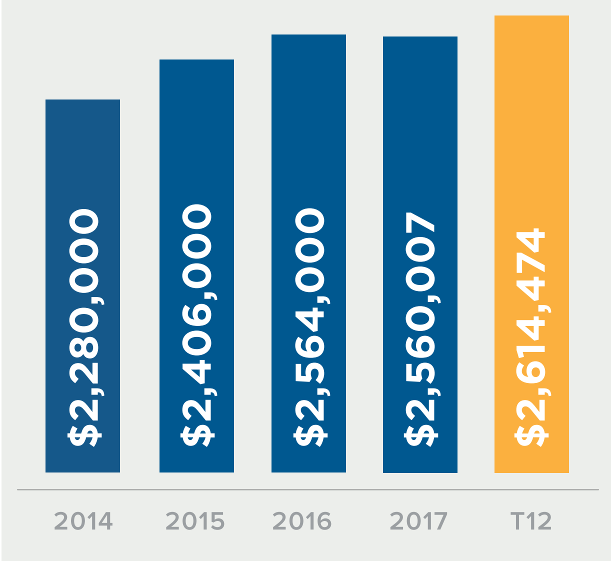
PRACTICE INFORMATION

Total Assets Under Advisory	$375,000,000
Assets Under Management	$179,000,000
Form of Ownership	S Corp
Total # of Employees	7
Licensed Employees	3
Unlicensed Employees	4
Errors & Omission Insurance?	Yes
% of Overhead / Expenses	50%

REVENUE



GROSS REVENUE



INQUIRE NOW

Visit **www.fptransitions.com/18-243-inquire** or log in to your member dashboard to inquire.

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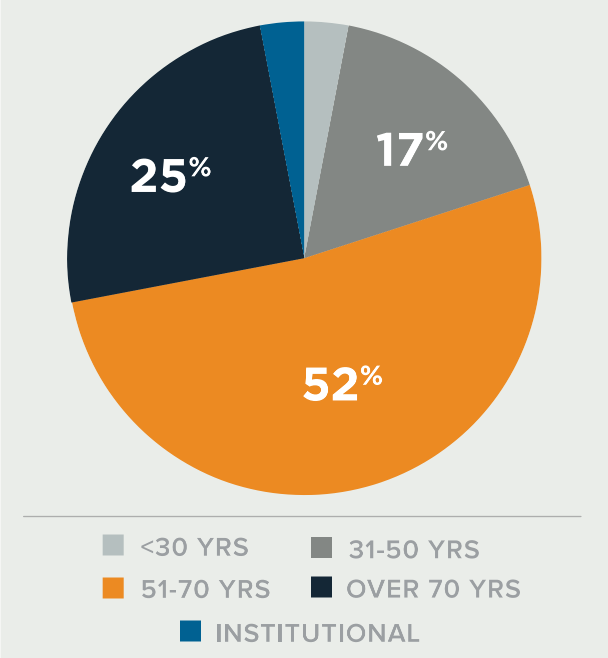
SELLING PRINCIPAL

Licenses	24, 63, 65
Designations	CFP
Education	Bachelor's Degree
Years in Business	23
Years in Industry	36
Seller's Age Range	60-70
Insurane Lines Carried	Life, Health, Disability, LTC
Currently Licensed?	Yes

CLIENT DEMOGRAPHICS



SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$2,278,695	
SECURITIES-BASED		
Stocks		$3,953
Bonds		$3,429
Mutual Funds		$23,846
Variable Annuities		$8,195
REITS		$405
Other	$293,600	
INSURANCE-BASED		
Long Term Care		$1,214
Other		$1,136
TOTALS		
	$2,572,295	**$42,179**

REVENUE SOURCES