FP TRANSITIONS®

LISTING 18-244

LOCATION	REVENUE	ASKING
Pacific Northwest	$995,600	$2,550,000

This client-centric RIA practice located in the Pacific Northwest is focused on providing clients with well-reasoned, holistic financial guidance. This practice's current annual revenue is approximately $995,000, with approximately $100 million in AUM. Started 30 years ago, this practice currently has 276 clients with an average client tenure of 12 years.

The preferred buyer would be a well-established RIA willing to retain the seller's office location and two support staff. The seller also prefers a buyer who has at least one staff member with the Certified Financial Planner® designation and a staff member that is knowledgeable in insurance products.

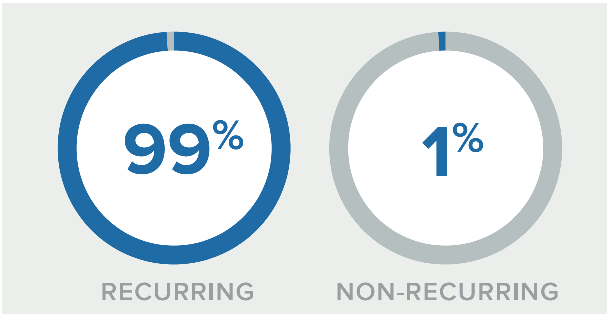
Price: $2,550,000

Term: Minimum 35% down, with the remainder on a note.

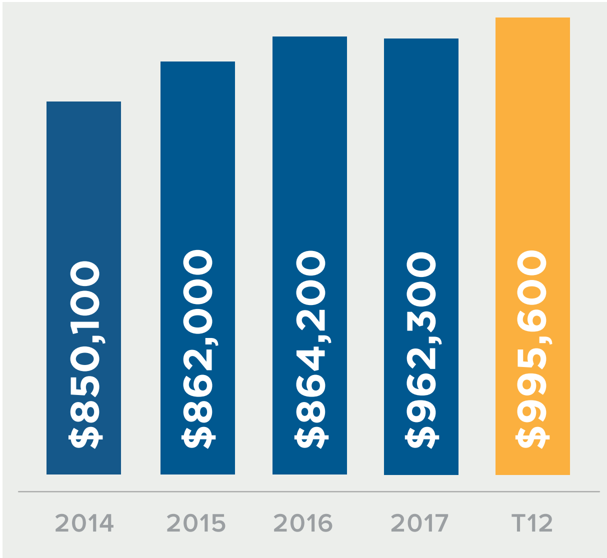
PRACTICE INFORMATION

Total Assets Under Advisory	$117,000,000
Assets Under Management	$100,000,000
Form of Ownership	S Corp
Total # of Employees	2
Billing Management Software	PortfolioCenter
Number of Branch Offices	1
Errors & Omission Insurance?	Yes
% of Overhead / Expenses	38%

REVENUE



GROSS REVENUE



INQUIRE NOW

Visit **www.fptransitions.com/18-244-inquire**
or log in to your member dashboard to inquire.

NOT A MEMBER? Create your free membership at **www.fptransitions.com/membership.**

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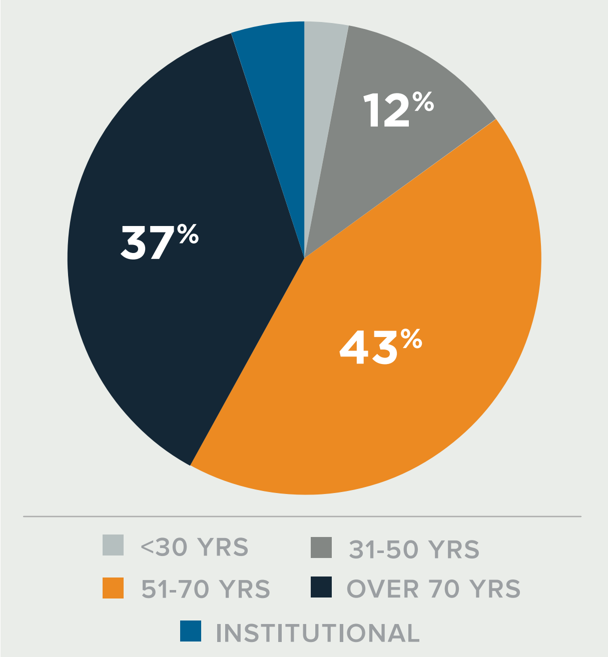
SELLER INFORMATION

Licenses	65
Designations	CFP, ChFC, CLU
Education	Master's Degree
Years in Business	20
Years in Industry	31
Seller's Age Range	60–70
Insurance Lines Carried	Life, LTC, Disability
Currently Licensed?	Yes

CLIENT DEMOGRAPHICS



SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$856,847	
3rd Party Managed Assets	$74,500	
401K Plans	$56,000	
HOURLY-BASED		
Financial Planning		$1,535
INSURANCE-BASED		
Term Life	$437	
Long Term Care	$4,601	
Disability	$1,680	
TOTALS		
	$994,065	**$1,535**

REVENUE SOURCES