LOCATION
Greater Boston Area

REVENUE
$1,090,261

ASKING
$3,600,000

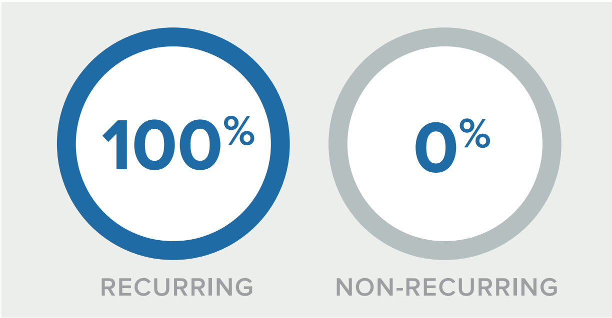
Located in the Greater Boston area, this client-centric RIA prides itself in providing strategic and objective financial counsel to its clients. This practice's typical client is looking for long-term financial guidance, not quick tips on the "stock of the week." Started over 30 years ago, this practice generates 99% of its annual gross revenue from approximately $114 million in assets under management. With established referral channels and an average client tenure of 12 years, this practice would make a great addition to a larger regional RIA firm seeking to establish or expand its roots in the Boston area.

The two practice owners, with over 45 years of combined experience as financial advisors, as well as their office manager wish to remain post sale. The preferred buyer would be a well-established hybrid RIA firm that is looking for a merger or "sell-and-stay" opportunity. The buyer must agree to use TD Ameritrade, Inc. as the custodian for the seller's clients post sale.

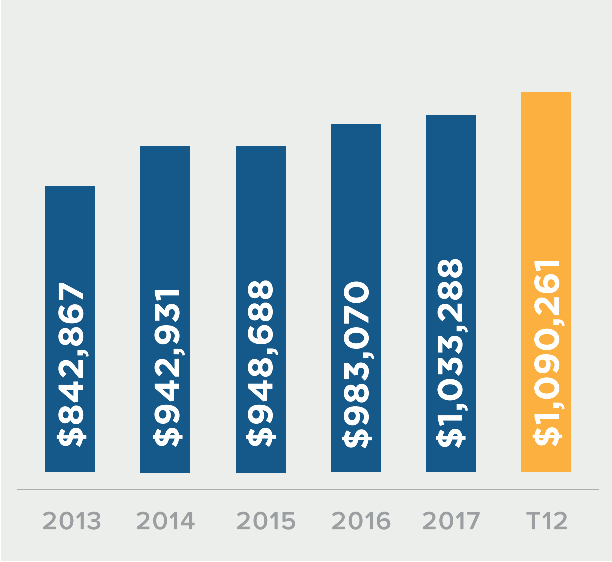
PRACTICE INFORMATION

Total Assets Under Advisory	$115,731,230
Assets Under Management	$114,148,796
Form of Ownership	S-Corp
Total Number of Employees	1
Unlicensed Employees	1
Billing Management Software	Orion
Number of Branch Offices	1
Errors & Omission Insurance?	Yes
% of Overhead / Expenses	35%

REVENUE



HISTORICAL REVENUE



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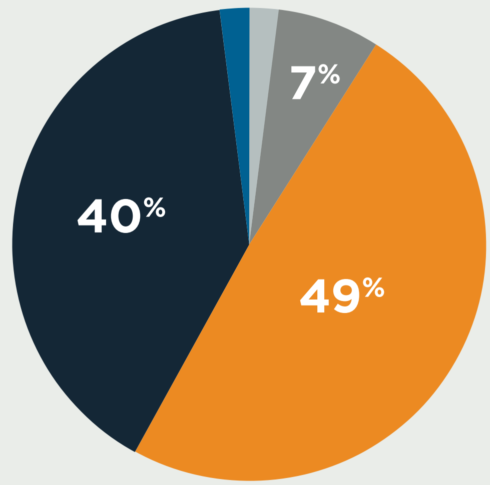
LISTING 18-245

LOCATION	REVENUE	ASKING
Greater Boston Area	$1,090,261	$3,600,000

MAJORITY OWNER

Licenses	7, 24, 63, 65
Designations	CFP
Education	Bachelor's Degree
Years in Business	33
Years in Industry	33
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	$1,024,300	
401K Plans	$16,815	
Other	$36,626	
SECURITIES-BASED		
Variable Annuities	$10,481	
INSURANCE-BASED		
Long-Term Care	$2,039	
TOTALS		
	$1,090,261	

REVENUE SOURCES