



LOCATION
Texas

REVENUE
\$1,359,299

ASKING
\$3,700,000

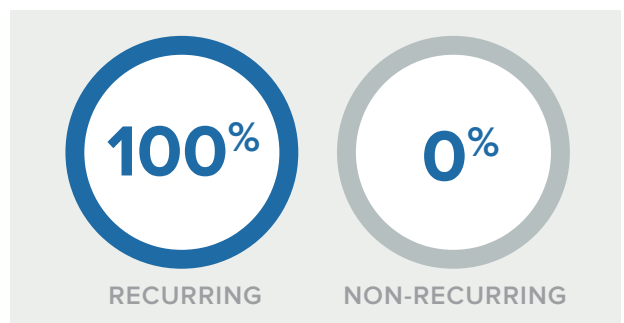
With offices located in Houston and Austin, Texas, this fee-only RIA practice is focused on providing financial advice to the fee-savvy, tax aware accredited investor. Through the use of active and passive investments, this practice uses tactical and strategic asset allocation, and creates customized portfolios for each client. With annual gross revenue exceeding \$1,350,000 on approximately \$197,000,000 in AUM from approximately 160 households, this practice would make a great addition to a larger RIA firm seeking to establish or expand its roots in the Houston and Austin, Texas areas and beyond. With over 60 years of combined experience in the investment advisor space, the principals of this practice are seasoned advisors with deep connections in Texas and well-established referral networks.

Given the principals and staff wish to remain post sale, the preferred buyer would be a well-established RIA firm that is looking for a merger or “sell-and-stay” opportunity.

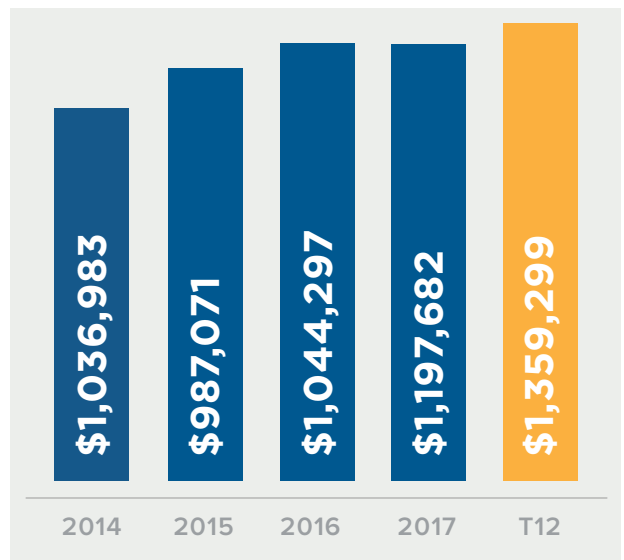
PRACTICE INFORMATION

Total Assets Under Advisory	\$197,741,832
Assets Under Management	\$197,741,832
Form of Ownership	LLC
Total # of Employees	2
<i>Licensed Employees</i>	1
Billing Management Software	Quickbooks, Tamarac
Number of Branch Offices	2
Errors & Omission Insurance?	Yes
% of Overhead / Expenses	36%

REVENUE



HISTORICAL REVENUE



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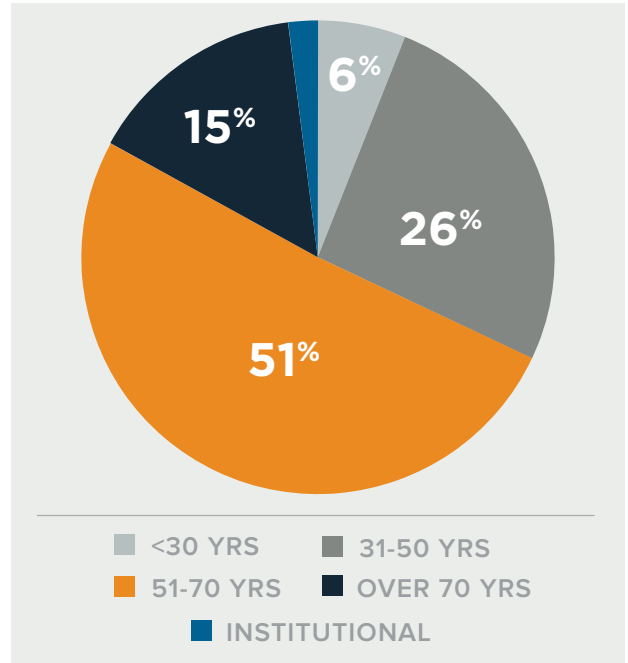
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PRINCIPALS

Licenses	65
Designations	CFP
Education	Bachelor's Degree
Years in Business	16
Combined Years in Industry	60+
Age Range	30-65
Insurance Lines Carried	None
Currently Licensed?	Yes

CLIENT DEMOGRAPHICS



SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$1,353,820	
401K Plans	\$5,479	
TOTALS		
	\$1,359,299	

REVENUE SOURCES

