FP TRANSITIONS®

LISTING 19-256

LOCATION	REVENUE	ASKING
Seattle Area	$1,289,750	$2,900,000

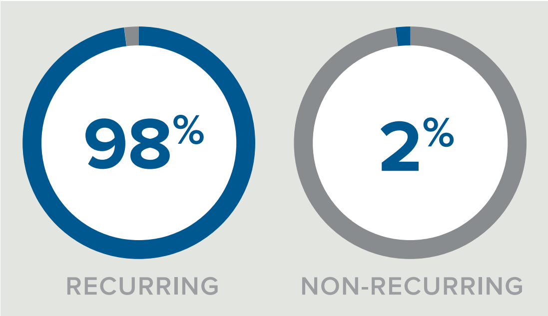
This Seattle area fee-only RIA and CPA practice is focused on being a trusted source of financial and tax advice for its individual and business clients. With annual gross revenue of $1,289,750, $998,250 from fees on approximately $95 million in assets from 298 households and $291,500 from CPA services, this practice would make a great addition to a larger firm providing similar services that seeks to establish or expand its presence in Washington. With over 55 years of combined experience working with clients in Washington, the two principals of this practice are seasoned professionals with deep generational client relationships and robust referral networks in the area.

The preferred buyer would be a well-established RIA on the TD Ameritrade platform that provides similar advisory and CPA services to its clients in-house. The preferred buyer would also retain the practice's five staff members and assume the current office lease. Additionally, the practice's two principals are willing to stay on and assist the buyer for a couple of years post-acquisition if desired. Please note that the principals are not interested in separating the RIA and CPA businesses, nor are they interested in selling to a firm that outsources the wealth management or CPA services to a third party.

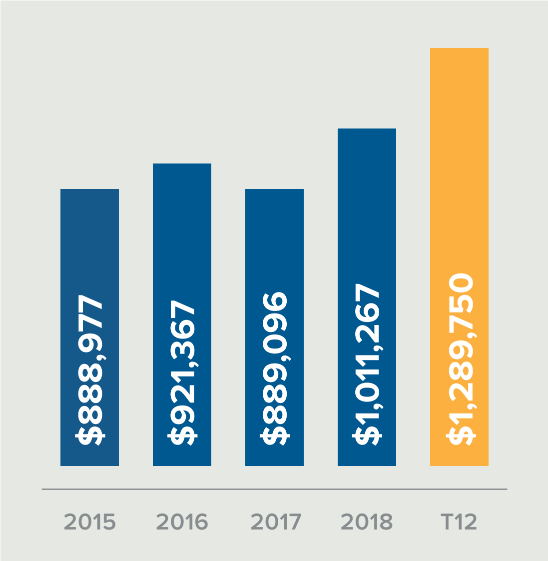
PRACTICE INFORMATION

Assets Under Advisory	$95,836,531
Assets Under Management	$95,836,531
Form of Ownership	S-Corp
Total Number of Employees	5
Licensed Employees	2
Billing Management Software	Advyzon
Errors & Omissions Insurance?	Yes
% of Overhead/Expenses	60%

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit **www.fptransitions.com/19-256-inquire**
or log in to your member dashboard to inquire.

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

LOCATION	REVENUE	ASKING
Seattle Area	$1,289,750	$2,900,000

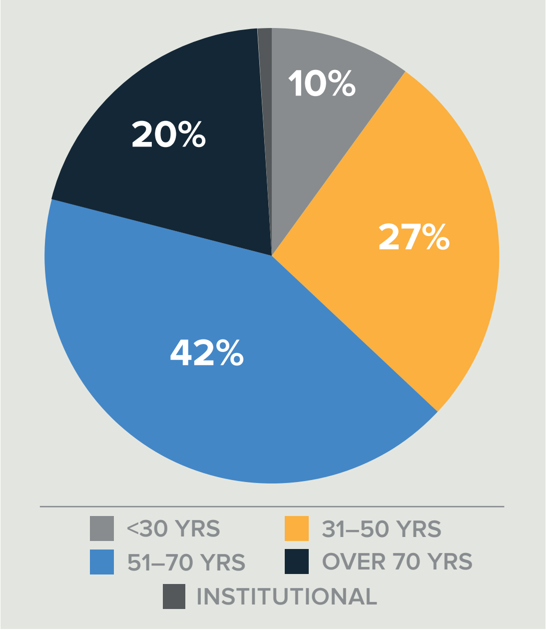
SELLER INFORMATION

Licenses	7, 66
Designations	CPA
Education	Master’s, Bachelor’s Degree
Years in Business	31
Years in Industry	23
Seller’s Age Range	55–65
Insurance Lines Carried	Life, Health, Disability, LTC
Currently Licensed?	Yes

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$998,250	
HOURLY-BASED		
Other	$262,350	$29,150
TOTALS		
	$1,260,600	**$29,150**

CLIENT DEMOGRAPHICS



REVENUE SOURCES