



LOCATION

Boston Area, MA

REVENUE

\$937,254

ASKING

\$2,156,000

This IAR/RR practice headquartered in the Boston area, with two small satellite offices, one in Vermont and another in Martha’s Vineyard, is focused on socially responsible investing by aligning client values with their portfolio while still achieving portfolio performance that is competitive with the overall market. With annual gross revenue exceeding \$937,000, of which approximately \$918,000 is recurring revenue from fees on approximately \$66 million in assets, this practice has had steady growth over the last six years and would make a great addition to a larger firm seeking to establish or expand its presence in the Boston area.

The preferred buyer would be a well-established firm focused on socially responsible investing that is willing to retain this practice’s staff—two producers and one assistant.

PRACTICE INFORMATION

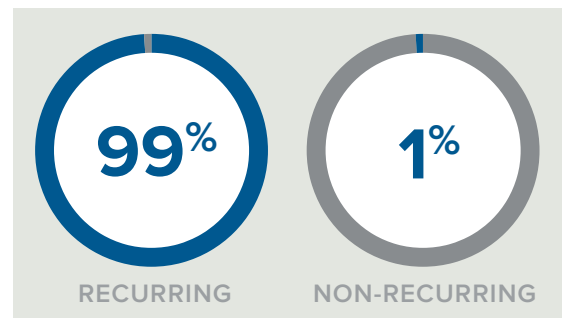
Assets Under Advisory	\$66,630,151
Assets Under Management	\$65,763,120
Form of Ownership	Sole Proprietor
Total Number of Employees	3
<i>Licensed Employees</i>	2
Number of Branch Offices	3
Errors & Omissions Insurance?	Yes
% of Overhead/Expenses	38%

INQUIRE NOW

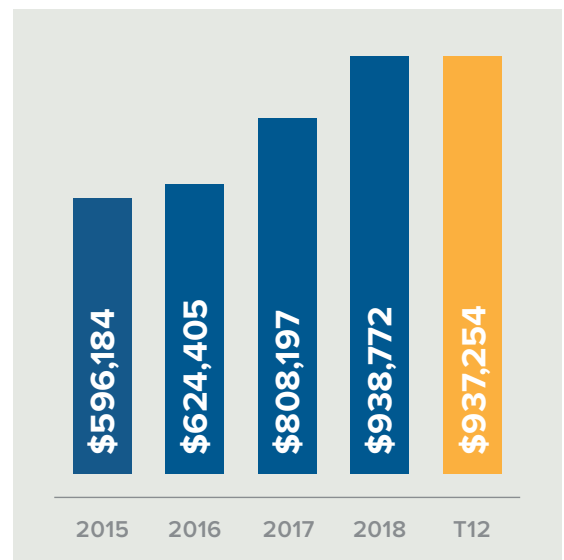
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REVENUE



HISTORICAL REVENUE





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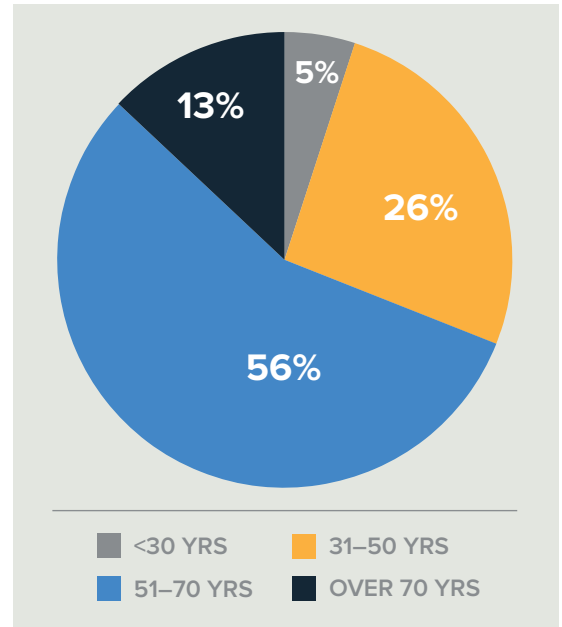
SELLER INFORMATION

Licenses	7, 24, 66
Education	Master's Degree
Years in Business	22
Years in Industry	25
Seller's Age Range	65-75
Insurance Lines Carried	Life, Health, LTC
Currently Licensed?	Yes

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$918,158	
401K Plans	\$1,950	
SECURITIES-BASED		
Bonds		\$855
Mutual Funds		\$3,789
Variable Annuities	\$528	
Other	\$9,574	
INSURANCE-BASED		
Fixed Annuities		\$2,400
TOTALS		
	\$930,210	\$7,044

CLIENT DEMOGRAPHICS



REVENUE SOURCES

