



LOCATION

Lafayette Parish, LA

REVENUE

\$666,262

ASKING

\$1,450,000

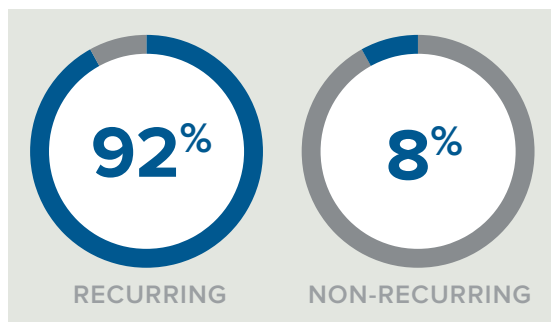
This RR/IAR practice, located in Lafayette Parish, Louisiana, is focused on providing clients with customized financial planning and coaching each client on how best to achieve their financial goals. The trailing twelve months revenue for this practice is \$666,262, of which \$486,484 is from fees on approximately \$33 million in assets from 143 households, with the majority of the remaining revenue from mutual funds, annuities, 401 (k) plans, and universal life insurance. This practice has a very loyal client base with an average tenure of 21 years.

The preferred buyer would be a RR/IAR or hybrid RIA with a financial planning focus and a client-first mentality. The seller would prefer a buyer with a local presence who is willing to retain the practice's associate advisor, who is Series 7 and 66 licensed.

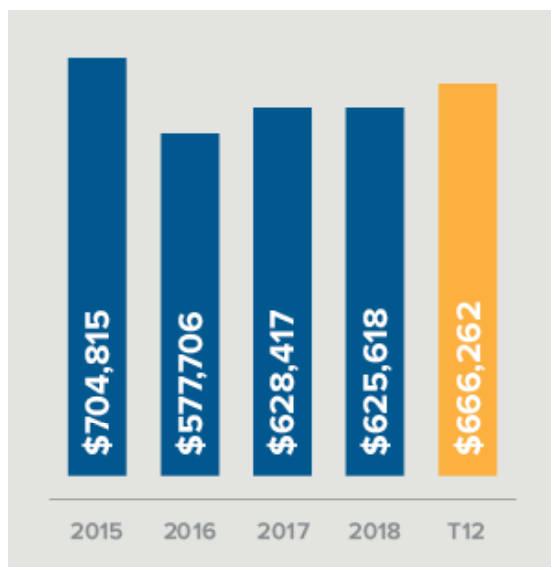
PRACTICE INFORMATION

Assets Under Advisory	\$33,295,086
Assets Under Management	\$81,455,781
Households	143
Form of Ownership	S-Corp
Total Number of Employees	3
<i>Licensed Employees</i>	2
<i>Unlicensed Employees</i>	1
Billing Management Software	QuickBooks
Errors & Omissions Insurance?	Yes
% of Overhead/Expenses	32%

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit www.fptransitions.com/19-264-inquire or log in to your member dashboard to inquire.

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



LOCATION
Lafayette Parish, LA

REVENUE
\$666,262

ASKING
\$1,450,000

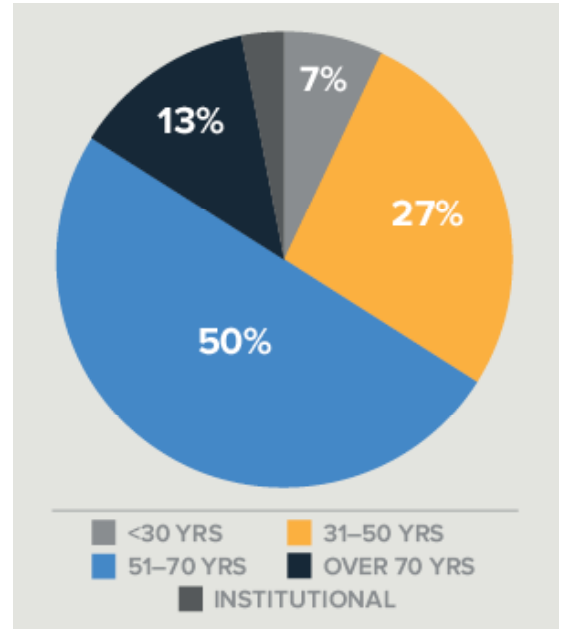
SELLER INFORMATION

Licenses	6, 7, 24, 63, 65
Designations	ChFC
Education	Bachelor's Degree
Years in Business	41
Years in Industry	41
Seller's Age Range	60-65
Insurance Lines Carried	Life, Health, Disability, LTC
Currently Licensed?	Yes

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$486,484	
Third-Party Assets	\$312	
401 (k) Plans	\$14,709	
SECURITIES-BASED		
Stocks		\$19
Mutual Funds	\$23,407	\$13,138
Variable Annuities	\$74,973	\$20,790
REITS	\$11,066	
INSURANCE-BASED		
Term Life		\$207
Long-Term Care		\$1,758
Disability	\$27	
Other		\$19,372
TOTALS	\$610,978	\$55,284

CLIENT DEMOGRAPHICS



REVENUE SOURCES

