



LOCATION

Florida Panhandle

REVENUE

\$915,000

ASKING

\$1,000,000

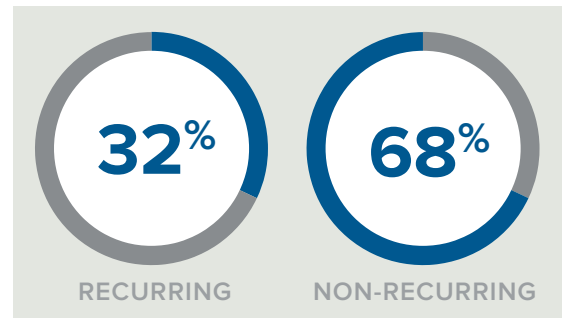
This IAR practice, located in the Florida panhandle region, offers well-rounded and focused financial planning and guidance to clients. This practice has trailing 12 months revenue of \$915,000, of which \$276,000 is from approximately \$51 million in assets, \$614,000 from fixed annuities, \$16,000 from financial planning, and \$9,000 from term life, universal life, and long-term care insurance products. The two principals of this practice prioritize building client confidence and developing relationships of trust which has resulted in an extremely loyal client base with an average tenure of 20 years.

The preferred buyer would be an IAR or hybrid RIA who is committed to maintaining the nurturing, service-driven approach to which clients are accustomed. The preferred buyer would also lease the practice’s current office space, which is owned by one of the practice’s principals, and retain the practice’s unlicensed staff member.

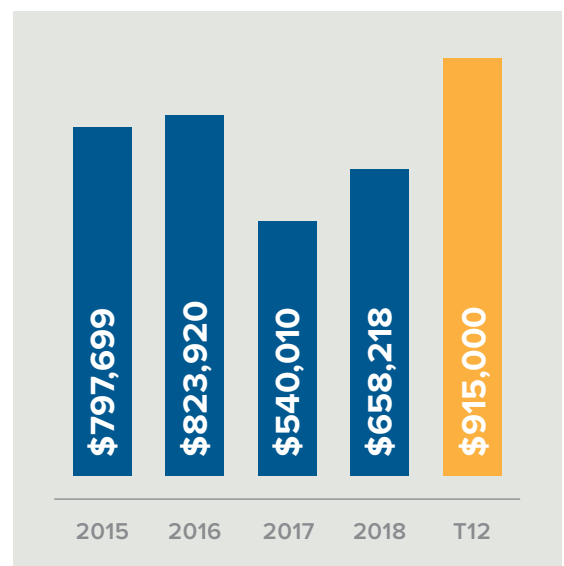
PRACTICE INFORMATION

Assets Under Advisory	\$51,000,000
Assets Under Management	\$100,000,000
Households	600
Form of Ownership	S-Corp
Total Number of Employees	1
<i>Unlicensed Employees</i>	1
Number of Branch Offices	1
Errors & Omissions Insurance	Yes
% of Overhead/Expenses	24

REVENUE



HISTORICAL REVENUE



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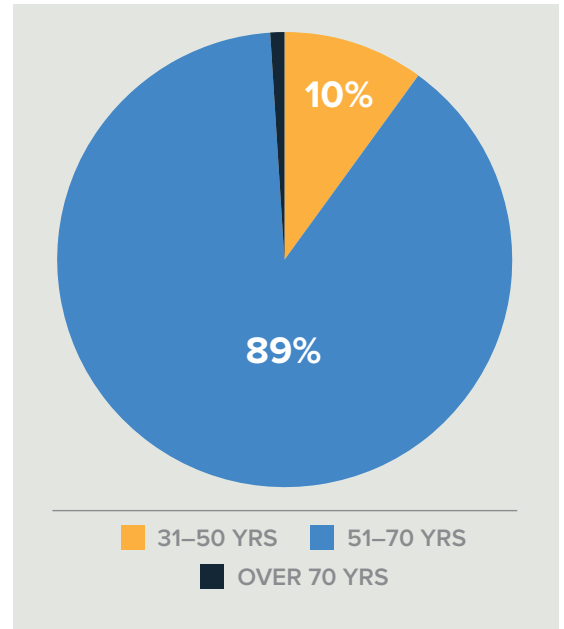
REVENUE
\$915,000

ASKING
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SELLER INFORMATION

Licenses	6, 63, 65, 66
Education	Bachelor's Degree
Years in Business	15
Years in Industry	30
Seller's Age Range	70-76
Insurance Lines Carried	Life, LTC, Other
Currently Licensed?	Yes

CLIENT DEMOGRAPHICS



SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$276,000	
HOURLY-BASED		
Financial Planning		\$16,000
INSURANCE-BASED		
Term Life		\$4,000
Long-Term Care		\$3,000
Fixed Annuities	\$14,000	\$600,000
Other		\$2,000
TOTALS		
	\$290,000	\$625,000

REVENUE SOURCES

