



LOCATION

Baltimore, MD

REVENUE

\$308,320

ASKING

\$700,000

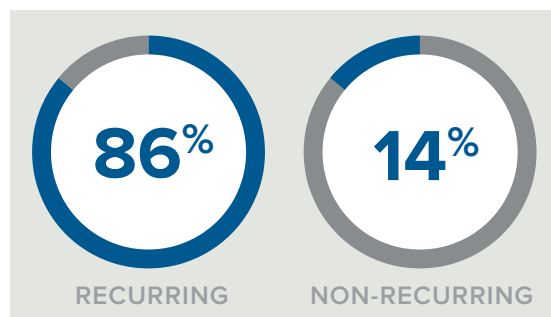
This Maryland-based RR practice offers strategy-based portfolio management and personalized financial planning to 48 client households. Current annual revenue for this practice is \$308,320, of which \$216,800 is recurring fee income from over \$20 million in assets. The practice also generates \$84,025 from stocks, bonds, mutual funds, securities-based revenue, and \$1,190 from insurance products.

The owner seeks a merger or Sell and Stay® partner, as the principal of the practice prefers to stay on post-sale. The ideal partner would be a mid-sized firm in the New England area that is technologically savvy.

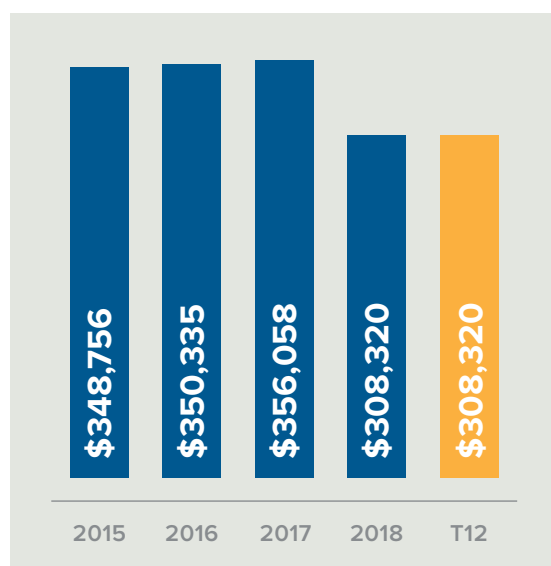
PRACTICE INFORMATION

Assets Under Advisory	\$20,186,658
Assets Under Management	\$28,838,083
Households	48
Form of Ownership	LLC
Billing Management Software	QuickBooks
Errors & Omissions Insurance	Yes
% of Overhead/Expenses	21%

REVENUE



HISTORICAL REVENUE



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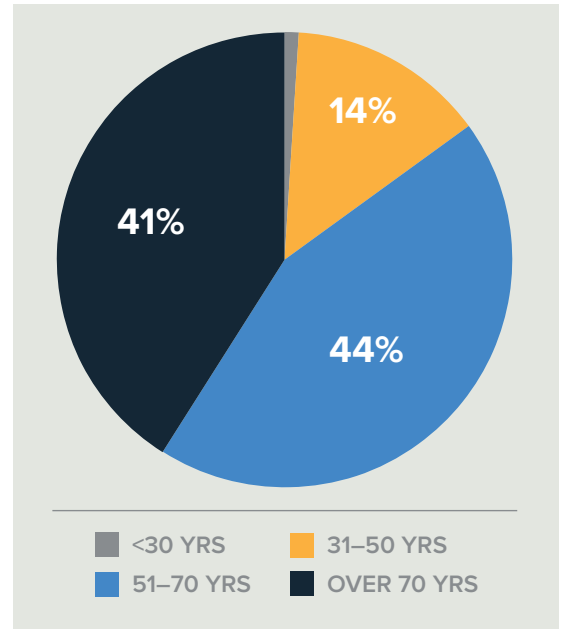
SELLER INFORMATION

Licenses	7, 63, 65
Education	Bachelor's Degree
Years in Business	12
Years in Industry	26
Seller's Age Range	55-70
Insurance Lines Carried	Life, LTC
Currently Licensed?	Yes

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$216,800	
Other	\$6,305	
SECURITIES-BASED		
Stocks		\$13,116
Bonds		\$11,214
Mutual Funds	\$14,203	\$13,858
Variable Annuities	\$26,370	\$5,264
INSURANCE-BASED		
Long-Term Care	\$1,190	
TOTALS		
	\$264,868	\$43,452

CLIENT DEMOGRAPHICS



REVENUE SOURCES

