



LOCATION

Northern Washington, D.C.

REVENUE

\$910,850

ASKING

\$2,400,000

This fee-only RIA in the northern Washington, D.C. area focuses on cost-effective portfolio structuring and a collaborative approach to investment and retirement strategies. The practice currently generates gross revenue of approximately \$910,000, 98% of which is recurring revenue from fees on approximately \$93 million of assets. The practice currently serves 78 client households with an average tenure of 12 years. The principal of this practice has been providing financial advisory services to clients in the northern Washington, D.C. area and beyond for over 35 years and has well-established referral networks.

The ideal buyer would be a well-established, fee-only RIA on the Schwab platform, with a proven investment management track record and a strong background in tax and estate planning. Buyer must also be conscious of and maintain cost effective investment portfolios and focus on minimizing tax consequences for clients. The buyer should also have at least one staff member with a Certified Financial Planner® designation. A tax professional on staff would be preferred.

PRACTICE INFORMATION

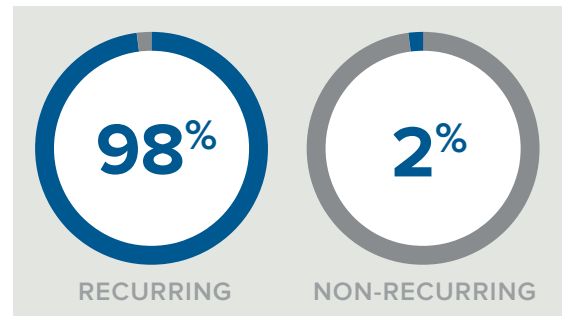
Assets Under Advisory	\$93,500,000
Assets Under Management	\$93,500,000
Households	78
Form of Ownership	Sole Proprietorship
Total Number of Employees	1
<i>Unlicensed Employees</i>	1
% of Overhead / Expenses	10%

INQUIRE NOW

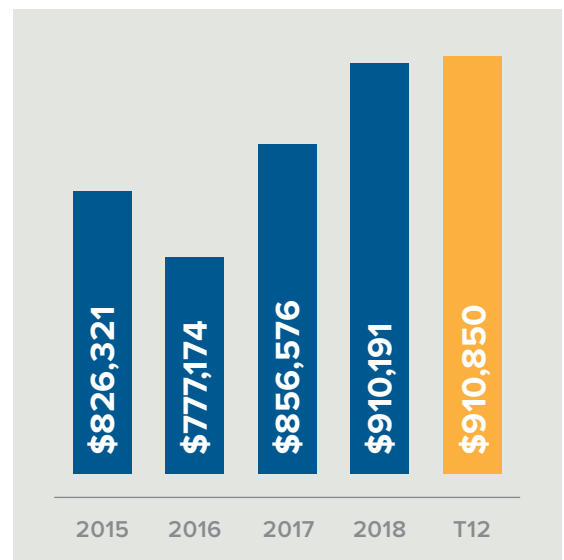
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REVENUE



HISTORICAL REVENUE





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REVENUE

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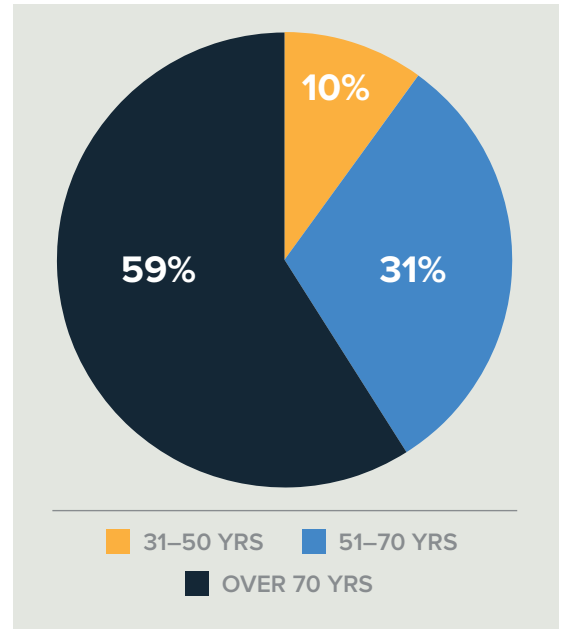
ASKING

\$2,400,000

SELLER INFORMATION

Licenses	65
Education	Master's Degree
Years in Business	35
Years in Industry	35
Seller's Age Range	65-70

CLIENT DEMOGRAPHICS



SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$890,850	
HOURLY-BASED		
Taxes		\$13,000
Consulting		\$7,000
TOTALS		
	\$890,850	\$20,000

REVENUE SOURCES

