LISTING 19-271

LOCATION	REVENUE	ASKING
San Francisco Area, CA	$259,134	$560,000

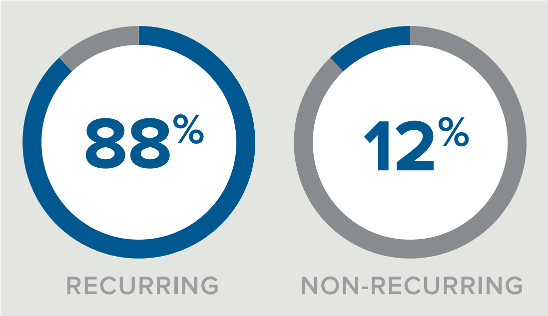
This seller is an RR/IAR focused on providing personalized financial planning and guidance to each client. Most of the seller's approximately 100 clients are in the San Francisco area and have been clients of the seller for 29 years on average. With trailing 12 months revenue of approximately $259,000, this book would make a great addition to a deeply rooted San Francisco area firm.

The preferred buyer would be a well-established firm or advisor with at least ten years of experience who can provide the seller's clients with the personalized guidance that they have each come to expect. The preferred buyer would also have experience working with single, divorced, and widowed women clients.

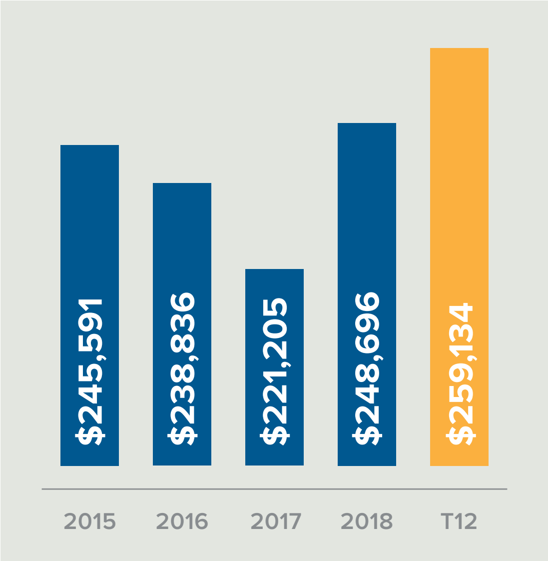
PRACTICE INFORMATION

Assets Under Advisory	$16,125,676
Assets Under Management	$65,024,761
Households	100
Form of Ownership	Sole Proprietorship
Billing Management Software	Proprietary
% of Overhead/Expenses	18%

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit **www.fptransitions.com/19-271-inquire**
or log in to your member dashboard to inquire.

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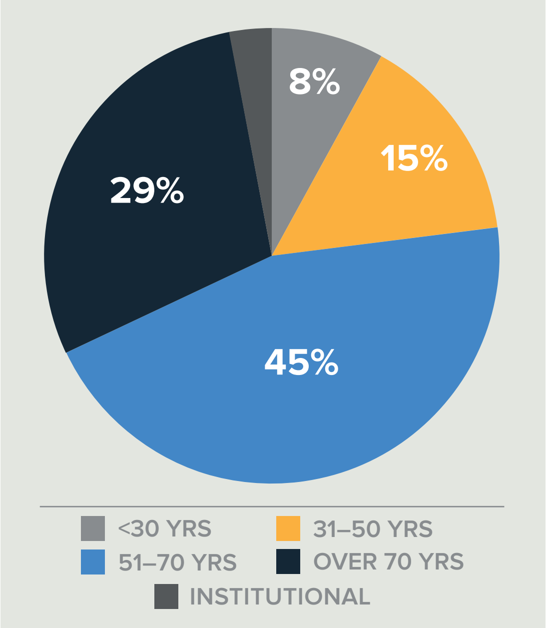
SELLER INFORMATION

Licenses	7, 24, 63, 65
Designations	ChFC, CLU, MBA, CASL
Education	Graduate Degree
Years in Business	36
Years in Industry	36
Seller's Age Range	65–70
Insurance Lines Carried	Life, Disability, LTC
Currently Licensed?	Yes

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$68,403	
SECURITIES-BASED		
Stocks		$2,220
Bonds		$12
Mutual Funds	$80,230	$17,894
Variable Annuities	$80,229	$10,146
TOTALS		
	$228,862	**$30,272**

CLIENT DEMOGRAPHICS



REVENUE SOURCES