



LOCATION
Seattle Area, WA

REVENUE
\$601,693

ASKING
\$1,450,000

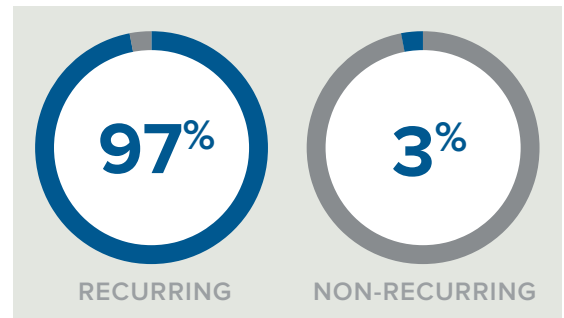
This RR/IAR practice in the Seattle area offers clients unbiased, responsible advice and expertise based on almost 30 years of experience in the financial services industry. Trailing 12 months revenue is \$601,693, of which \$465,524 is recurring, fee-based income, \$118,125 from annuity trails, and the remaining \$18,044 from universal life and long-term care insurance products. The firm utilizes a comprehensive and detailed process to curate a wealth management approach that aligns with each client’s desired financial/life goals. Many of this practice’s clients are in the tech industry.

The ideal buyer would be a larger, well-established firm with a strong presence in the Pacific Northwest that has at least one staff member with the CFP® designation.

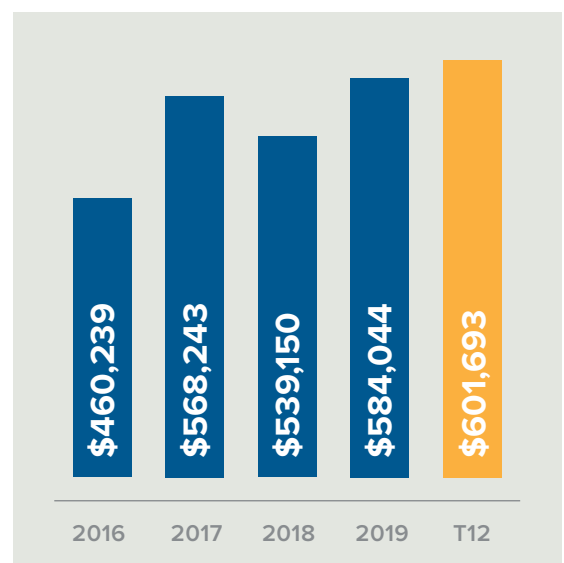
PRACTICE INFORMATION

| | |
|-----------------------------|---------------|
| Assets Under Advisory | \$72,241,927 |
| Assets Under Management | \$51,543,654 |
| Households | 99 |
| Form of Ownership | S Corporation |
| Total Number of Employees | 1 |
| Billing Management Software | QuickBooks® |

REVENUE



HISTORICAL REVENUE



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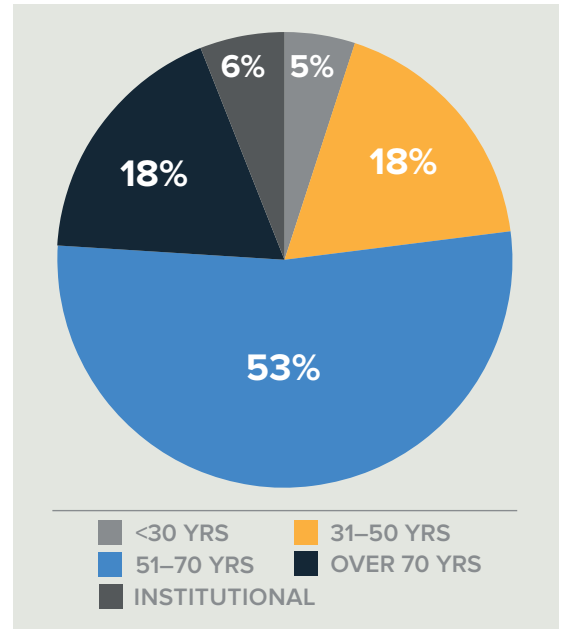
SELLER INFORMATION

| | |
|-------------------------|--------------------------|
| Licenses | 6, 7, 24, 63, 65 |
| Designations | CFP |
| Education | Associate's Degree |
| Years in Business | 21 |
| Years in Industry | 28 |
| Seller's Age Range | 65-70 |
| Insurance Lines Carried | Life, Health, Disability |

SOURCES OF REVENUE

| | RECURRING REVENUE | NON-RECURRING REVENUE |
|-------------------------|-------------------|-----------------------|
| FEE-BASED | | |
| Third-Party Assets | \$425,989 | |
| 401(k) Plans | \$39,535 | |
| SECURITIES-BASED | | |
| Annuities | \$118,125 | |
| INSURANCE-BASED | | |
| Term Life | | \$9,022 |
| Long-Term Care | | \$9,022 |
| TOTALS | | |
| | \$583,649 | \$18,044 |

CLIENT DEMOGRAPHICS



REVENUE SOURCES

