FP TRANSITIONS®

LISTING 20-281

LOCATION	REVENUE	ASKING
Boston Area, MA	$486,426	$1,100,000

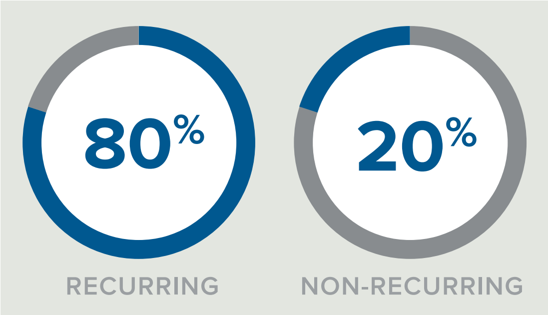
This Boston-area RIA practice provides custom comprehensive financial planning and investment management services to its clients. The practice has trailing 12 months gross revenue of approximately $486,000, of which approximately $280,000 is from managed assets and $200,000 from financial planning fees. This practice employs a low-cost, transparent investment strategy for its clients with an emphasis on socially responsible investing.

The preferred buyer would be a well-established RIA firm with at least one Certified Financial Planner® on staff with significant experience creating customized comprehensive financial plans for clients. The preferred buyer would also have a demonstrated commitment to a financially conservative and socially responsible investment philosophy. The two CFPs on staff, one full time and one part time, wish to remain post-sale. The principal would also consider remaining post-sale if desired by the buyer.

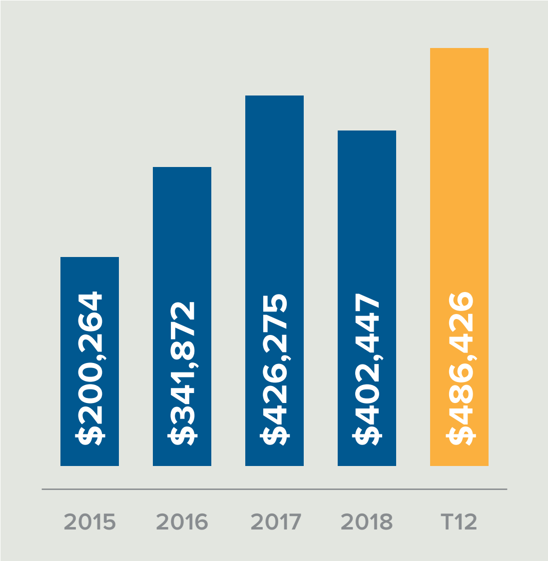
PRACTICE INFORMATION

Assets Under Advisory	$101,068,468
Assets Under Management	$30,117,664
Households	34
Form of Ownership	LLC
Total Number of Employees	3
Licensed Employees	2
Unlicensed Employees	1
Billing Management Software	E*TRADE

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit **www.fptransitions.com/20-281-inquire**
or log in to your member dashboard to inquire.

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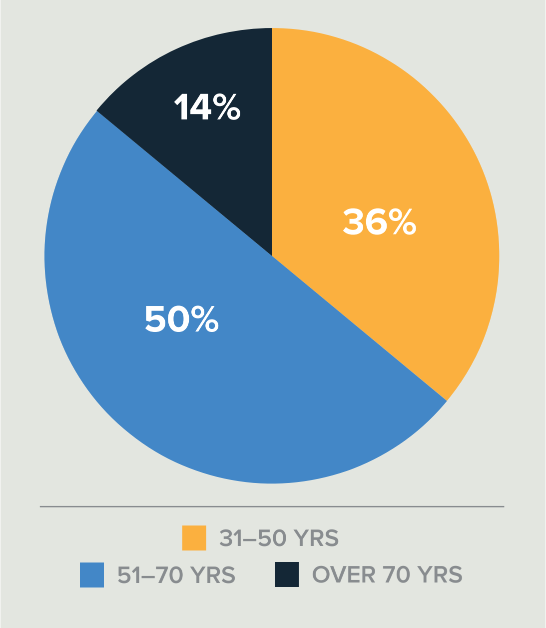
SELLER INFORMATION

Licenses	65
Designations	CFP®
Education	MBA
Years in Business	14
Years in Industry	18
Seller's Age Range	55–60

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$280,630	
401(k) Plans	$2,400	
HOURLY-BASED		
Financial Planning	$106,343	$97,053
TOTALS		
	$389,373	**$97,053**

CLIENT DEMOGRAPHICS



REVENUE SOURCES