FP TRANSITIONS®

LISTING 20-283

LOCATION	REVENUE	ASKING
Pacific Northwest	$375,316	$950,000

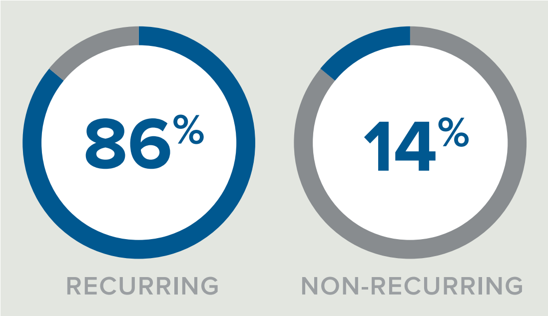
This fee-only RIA practice provides high net worth clients, primarily located in the Pacific Northwest, with custom portfolio management as well as income tax planning and preparation. The practice generates approximately $322,000 in recurring revenue on $75 million in managed assets, with an additional $46,000 generated from tax preparation fees and $7,000 from financial planning fees. The principal, with 40 years of experience in the industry, seeks a Sell and Stay® opportunity, remaining active in an advisory role with current clients and cultivating new business post-sale.

The buyer must be a fee-only RIA firm with a strong focus on financial planning and wealth management. The ideal buyer would have at least one Certified Financial Planner® and a CPA on staff.

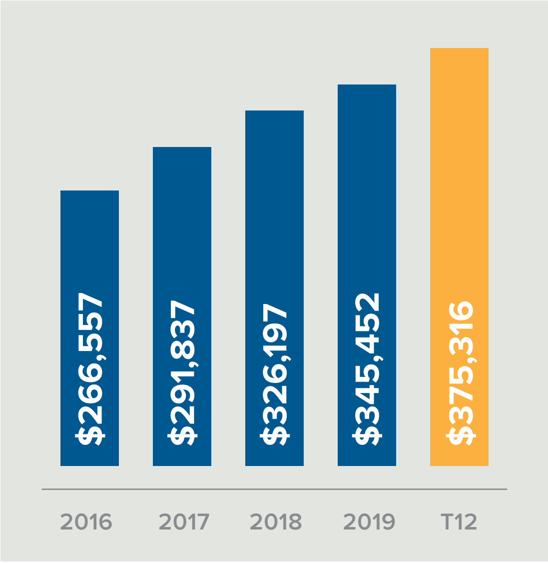
PRACTICE INFORMATION

Assets Under Advisory	$75,000,000
Assets Under Management	$75,000,000
Households	45
Form of Ownership	S Corporation
Billing Management Software	QuickBooks®
Number of Branch Offices	2

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit **www.fptransitions.com/20-283-inquire**
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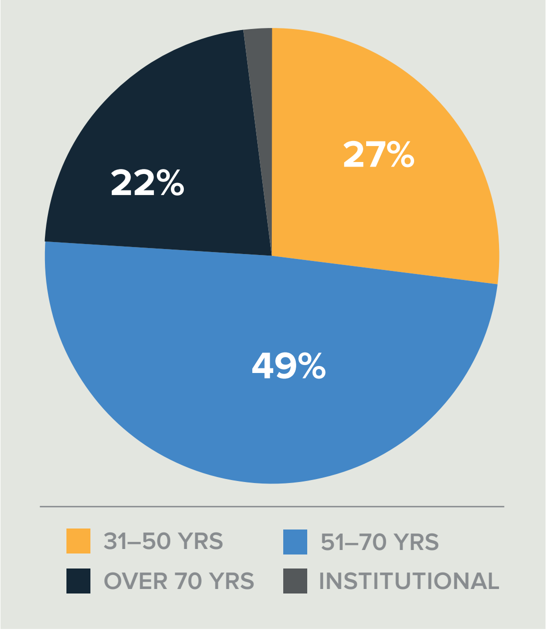
SELLER INFORMATION

Designations	CPA, CFP®, PFS, MSFP
Education	Bachelor's degree, Master's degree
Years in Business	32
Years in Industry	40
Seller's Age Range	59–63

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$322,012	
HOURLY-BASED		
Financial Planning		$7,222
Taxes		$46,082
TOTALS		
	$322,012	**$53,304**

CLIENT DEMOGRAPHICS



REVENUE SOURCES