FP TRANSITIONS®

LISTING 20-285

LOCATION	REVENUE	ASKING
Texas	$1,595,728	$4,300,000

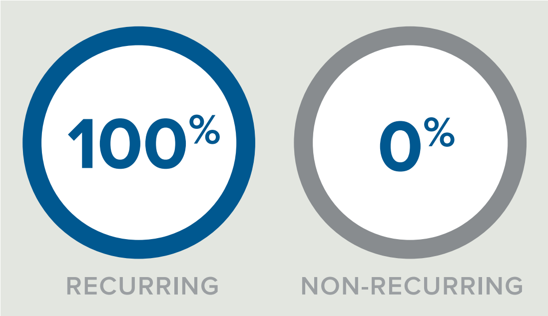
This Texas-based RIA firm is focused on being the financial quarterback for its clients via a full range of specialized services and a proactive, hands-on approach to the management of each client's total wealth. The firm manages more than $375,000,000 for just over 100 high net worth client households that have an average tenure with the firm of 13 years. Trailing 12 months revenue for this firm is approximately $1,600,000.

The ideal buyer would be a larger RIA firm that has a strong planning focus and provides clients with a high-touch comprehensive wealth management experience. A buyer with a high technological proficiency and a working knowledge of Orion and eMoney is desirable. The buyer must also be willing to retain, post-sale, the firm's minority partner, who is a CFP®, and the firm's five highly skilled staff members. The firm would also prefer that the buyer retain its current office location for at least four years.

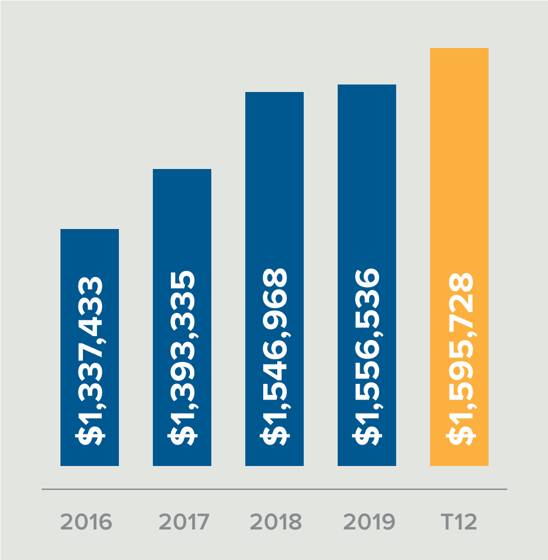
PRACTICE INFORMATION

Assets Under Advisory	$376,301,736
Assets Under Management	$376,301,736
Households	102
Form of Ownership	S Corporation
Total Employees	5
Billing Management Software	Vanco, Orion

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit **www.fptransitions.com/20-285-inquire** or log in to your member dashboard to inquire.

NOT A MEMBER? Create your free membership at **www.fptransitions.com/membership**.

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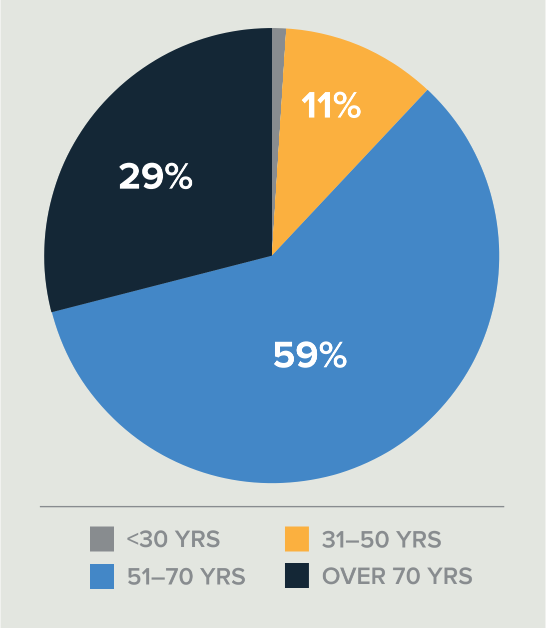
SELLER INFORMATION

Designations	CFP®, CLU, MBA
Education	MBA, Bachelor's degree
Years in Business	28
Years in Industry	36
Seller's Age Range	41–62

CLIENT DEMOGRAPHICS



SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$1,595,728	
TOTALS		
	$1,595,728	

REVENUE SOURCES