FP TRANSITIONS

LISTING 21-345

LOCATION	REVENUE	ASKING
National	$425,000	$1,100,000

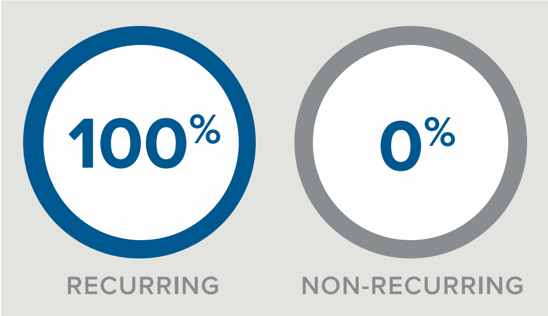
This RIA serves as an ERISA fiduciary for 11 corporate clients with a national footprint. The practice leverages tested funds and strategies to manage the corporate retirement accounts on a discretionary basis. The practice's trailing 12-month revenue was $425,000 from managing approximately $125 million in assets.

The ideal acquisition partner for this practice would be a firm that has experience in retirement plan consulting and investment advisory. The seller would prefer the buyer have either a CFP® or CFA® on staff. There are no employees to be retained and the seller is looking to exit after assisting with the transition of the client relationships.

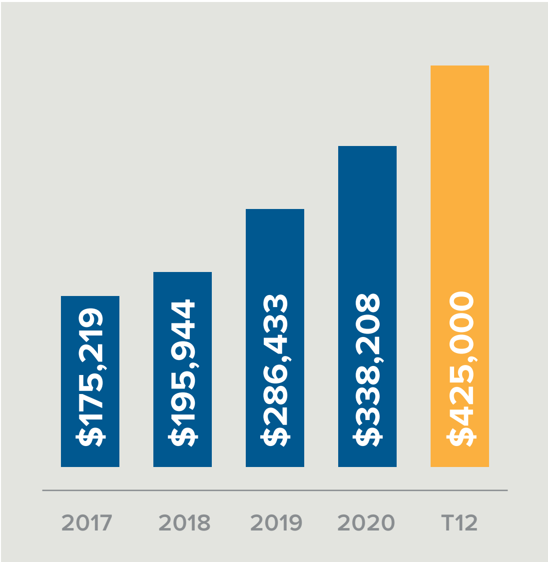
PRACTICE INFORMATION

Total Assets Under Advisory	$124,874,381
Assets Under Management	$124,874,381
Households	11
Form of Ownership	LLC
Total Number of Employees	1
Billing Management Software	Morningstar Office®

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit fptransitions.com/21-345-inquire or log in to your member dashboard to inquire.

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SELLER INFORMATION

Licenses	7, 66
Designations	CFP®
Education	Bachelor's Degree
Years in Industry	11

CLIENT DEMOGRAPHICS

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
401K Plans	$425,000	
TOTALS		
	$425,000	

REVENUE SOURCES