



LOCATION

Southeastern MA

REVENUE

\$276,599

ASKING

\$580,000

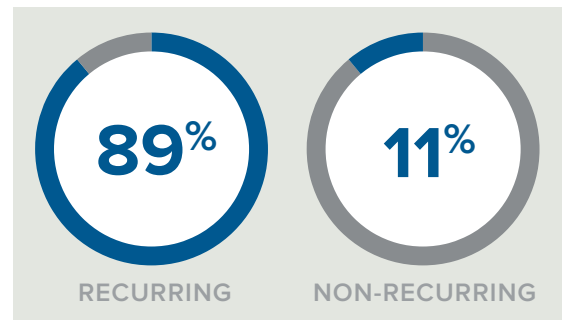
This IAR based in Southeastern Massachusetts seeks a buyer for a book of 43 clients. This book’s trailing 12 months revenue is \$276,599, of which \$247,342 is from managing approximately \$13 million in fee-based assets, with an additional \$29,257 from fixed annuities.

Most of the clients are nearing or in retirement and accustomed to a low-risk investment philosophy. The preferred buyer would be a well-established firm looking for a Sell and Stay® opportunity.

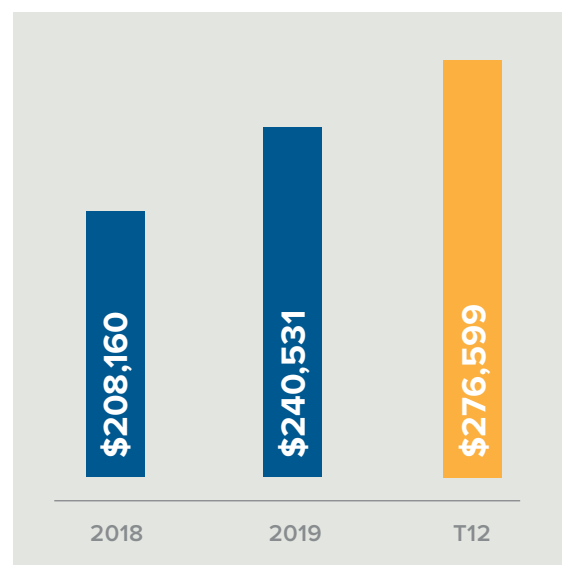
PRACTICE INFORMATION

Assets Under Advisory	\$19,111,960
Assets Under Management	\$12,918,866
Households	43
Form of Ownership	S Corporation
Total Number of Employees	1
Billing Management Software	Orion

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

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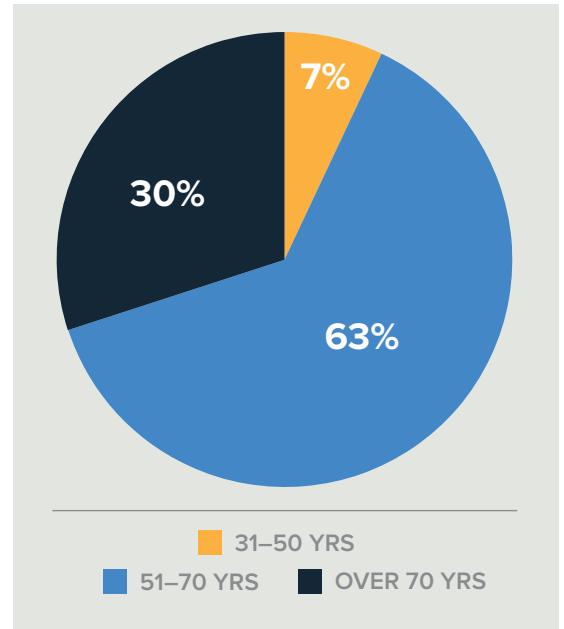
SELLER INFORMATION

Licenses	63
Designations	CPA, CFP, MBA, CLTC
Education	Master's Degree
Years in Business	38
Years in Industry	38
Seller's Age Range	70-75
Insurance Lines Carried	Life, Health, Disability, LTC
Currently licensed?	Yes

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$247,342	
INSURANCE-BASED		
Fixed Annuities		\$29,257
TOTALS		
	\$247,342	\$29,257

CLIENT DEMOGRAPHICS



REVENUE SOURCES

