



**LOCATION**  
Dallas, TX

**REVENUE**  
\$1,859,160

**ASKING**  
\$5,000,000

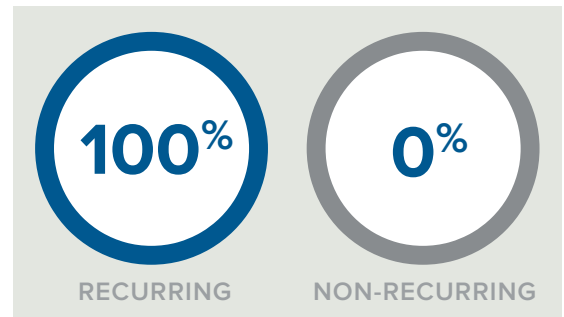
This RIA firm in the Dallas, Texas area serves its 290 households with a blend of cutting-edge technology and personalized active wealth management and financial planning. This firm does not believe in a one-size-fits-all approach and thus tailors its wealth management to the individualized needs of each client in order to help them achieve their financial goals, both short- and long-term. Current annual revenue is \$1.86 million—all recurring—from \$136 million in fee-based assets, which has grown steadily for the past five years. The firm’s two principals have developed strong referral channels in the local area. This firm would make a great addition to a larger RIA firm seeking to establish or expand its roots in the Dallas, Texas area.

Potential buyers should be amenable to a Sell and Stay® arrangement, as three members of the team prefer to remain with the firm post-closing.

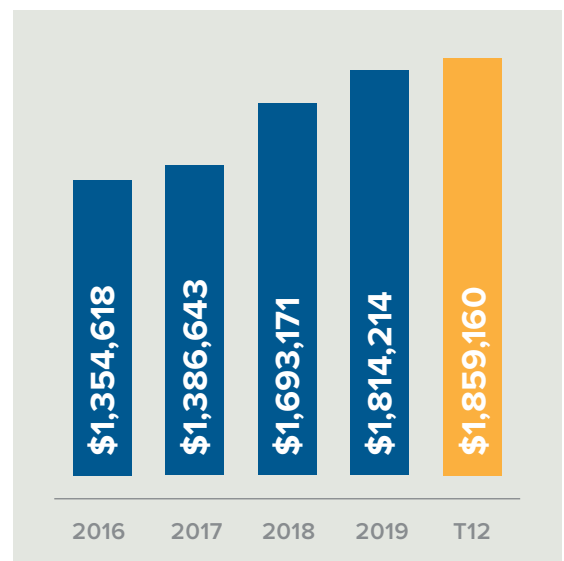
### PRACTICE INFORMATION

Assets Under Advisory	\$139,354,896
Assets Under Management	\$136,000,000
Households	290
Form of Ownership	LLC
Total Number of Employees	3
Billing Management Software	Advyzon
Number of Branch Offices	1

### REVENUE



### HISTORICAL REVENUE



### INQUIRE NOW

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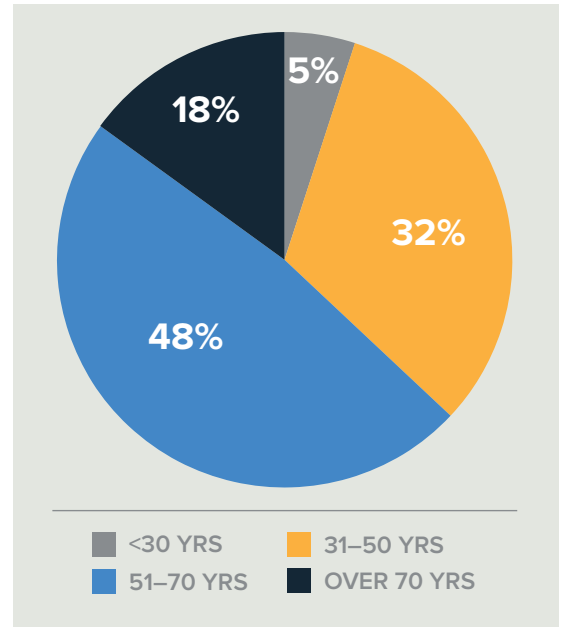
### SELLER INFORMATION

Designations	CFP
Education	Bachelor's Degree
Years in Business	11
Years in Industry	26
Seller's Age Range	40-55
Insurance Lines Carried	Life, Disability, LTC

### SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
<b>FEE-BASED</b>		
Fees from AUM	\$1,853,160	
<b>INSURANCE-BASED</b>		
Fixed Annuities	\$6,000	
<b>TOTALS</b>		
	<b>\$1,859,160</b>	

### CLIENT DEMOGRAPHICS



### REVENUE SOURCES

