FP TRANSITIONS

LISTING 20-298

LOCATION	REVENUE	ASKING
Maryland	$375,983	$800,000

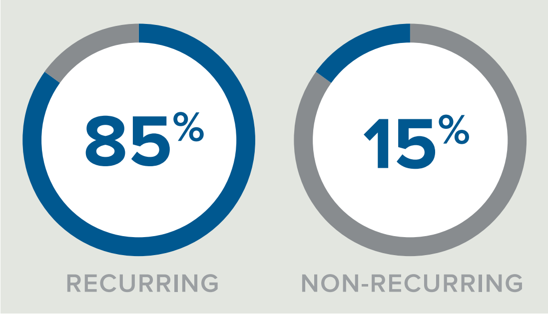
This RR/IAR practice in Montgomery County, Maryland, is focused on building a trusted relationship and improving the financial health of each of its 57 client households. With trailing 12 months revenue of $375,983, of which $301,507 is from managing approximately $27 million in fee-based assets, this practice would make a great tuck-in acquisition for a firm with a presence in the Washington, D.C. area.

The ideal buyer would have a similar client-first firm culture and excellent customer service. The buyer must have a Certified Financial Planner® on staff and insurance-licensed capabilities. Office space may be available if needed (lease currently extends through March of 2021).

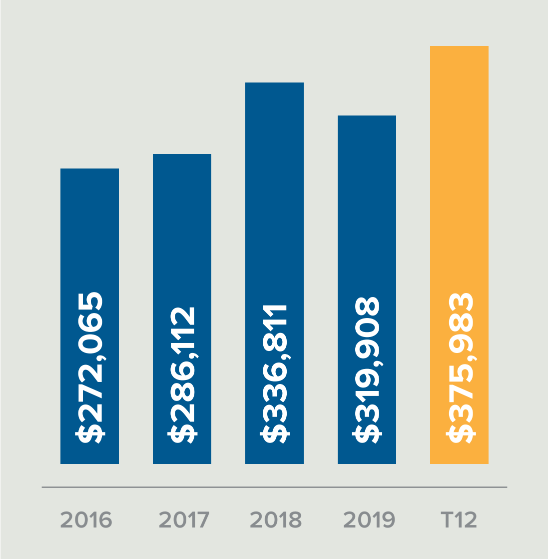
PRACTICE INFORMATION

Assets Under Advisory	$33,596,284
Assets Under Management	$27,196,385
Households	57
Form of Ownership	LLC
Total Number of Employees	1

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit **fptransitions.com/20-298-inquire** or log in to your member dashboard to inquire.

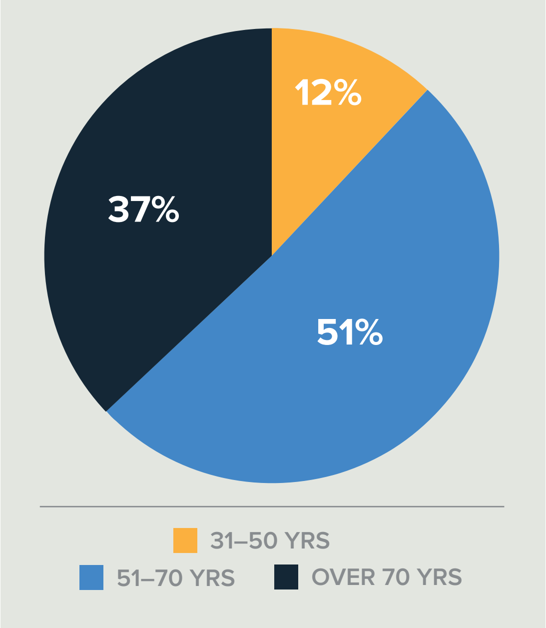
NOT A MEMBER? Create your free membership at **fptransitions.com/membership**.

LOCATION	REVENUE	ASKING
Maryland	$375,983	$800,000

SELLER INFORMATION

Licenses	7, 24, 63, 31
Designations	CFP
Education	Bachelor's Degree
Years in Business	12
Years in Industry	36
Seller's Age Range	65–70
Insurance Lines Carried	Life, Health

CLIENT DEMOGRAPHICS



SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$301,507	
SECURITIES-BASED		
Stocks		$789
Bonds		$348
Mutual Funds	$1,625	$171
Variable Annuities	$6,606	
INSURANCE-BASED		
Fixed Annuities	$8,909	$56,028
TOTALS		
	$318,647	**$57,336**

REVENUE SOURCES