FP TRANSITIONS®

LISTING 20-317

LOCATION	REVENUE	ASKING
Georgia	$382,281	$1,010,000

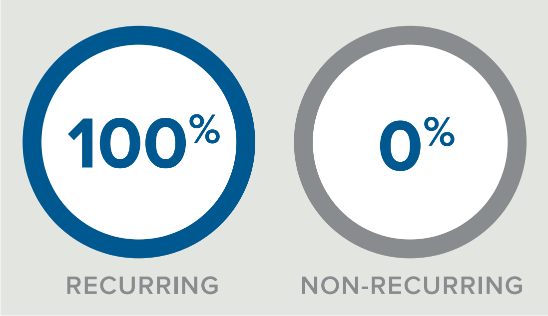
This RIA located in Atlanta provides goal oriented, individualized financial planning to its 54 households. Most of the practice's clients seek to maintain their current lifestyle into retirement as their main investment objective. The trailing 12 months' revenue for this practice is over $380,000 from managing almost $51 million in assets. Additionally, 34% of the managed assets are held by family groups where the practice principal has a strong relationship with the next generation.

An ideal buyer would be a mid-sized RIA or hybrid able to maintain one-on-one client contact and provide a tailored client experience. The buyer must be able to travel to or maintain a location in the Atlanta area and preferably have a CFA on staff.

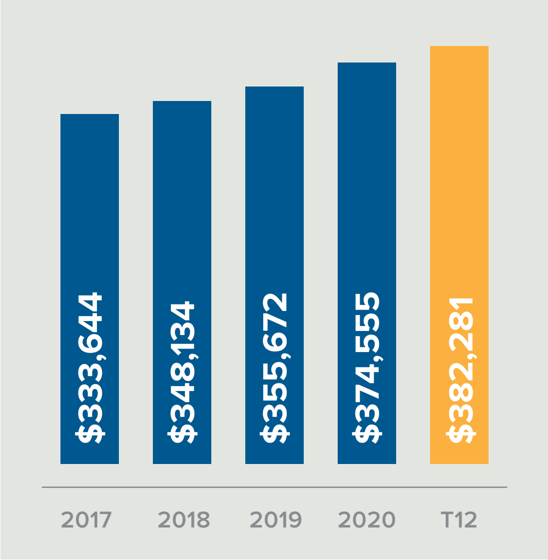
PRACTICE INFORMATION

Assets Under Advisory	$50,931,000
Assets Under Management	$50,931,000
Households	54
Form of Ownership	LLC
Billing Management Software	Morningstar
Errors & Omission Insurance?	Yes

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

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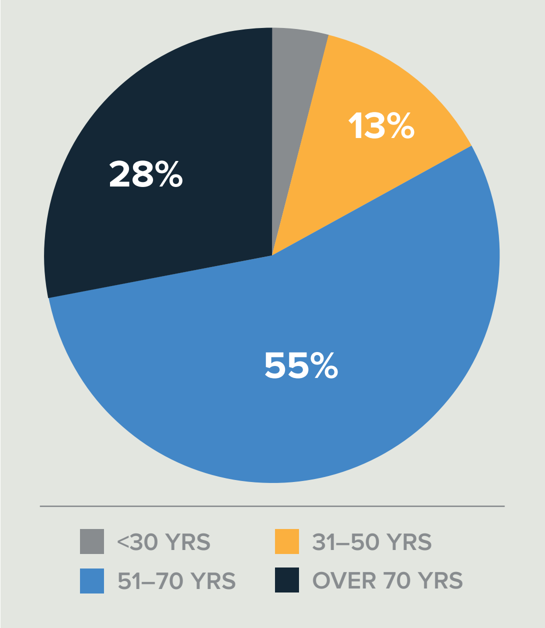
SELLER INFORMATION

Licenses	65
Designations	CFA
Education	MBA
Years in Business	20
Years in Industry	30
Seller's Age Range	60–65

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$382,281	
TOTALS		
	$382,281	

CLIENT DEMOGRAPHICS



REVENUE SOURCES