FP TRANSITIONS®

LISTING 21-321

LOCATION	REVENUE	ASKING
Pacific Northwest	$656,145	$1,700,000

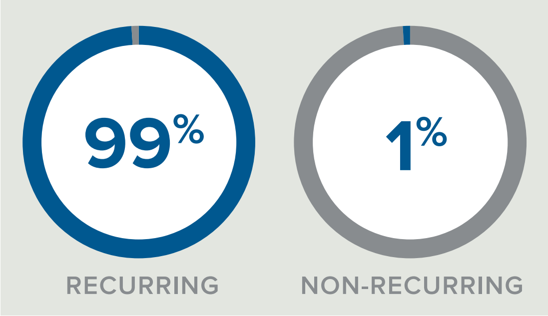
This Seattle-based RIA is focused on providing its 105 client households life goal-oriented financial planning and portfolio management. Client education is also central to this practice's service model. With trailing 12 months' revenue of $656,145, of which 95% is generated from managing approximately $87.5 million in assets, this practice would make a great addition to a larger RIA seeking to establish or expand its roots in the Pacific Northwest.

The preferred buyer would be a larger RIA firm that is committed to providing the practice's clients with the same personalized guidance and education they have come to expect. The buyer must be willing to retain the practice's four employees, which include three CFPs, and provide the practice's principal with a glidepath to retirement.

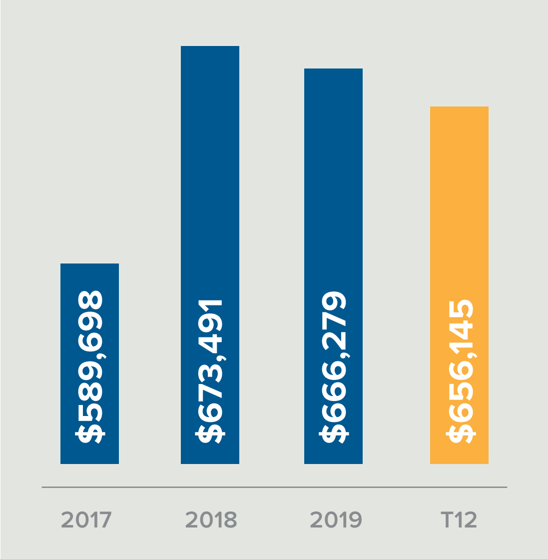
PRACTICE INFORMATION

Assets Under Advisory	$82,857,823
Assets Under Management	$87,448,890
Households	105
Form of Ownership	LLC
Total Number of Employees	4
Billing Management Software	QuickBooks®

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

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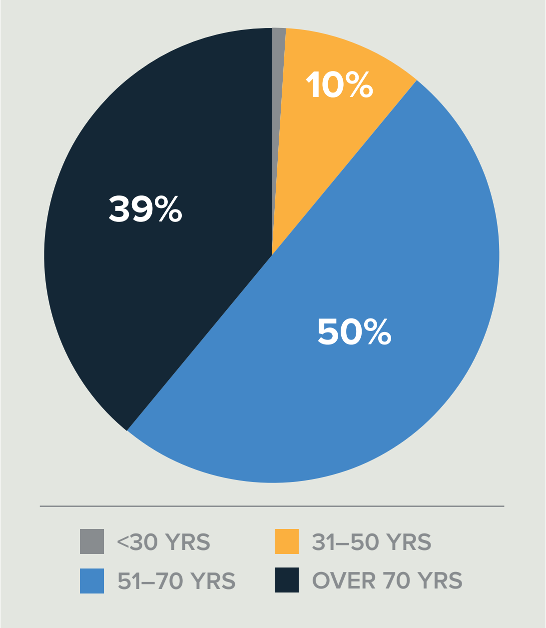
SELLER INFORMATION

Designations	CFP®
Education	MBA
Years in Business	23
Years in Industry	37
Seller's Age Range	65–70

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$622,048	
HOURLY-BASED		
Financial Planning	$29,031	$5,000
INSURANCE-BASED		
Other	$66	
TOTALS		
	$651,145	**$5,000**

CLIENT DEMOGRAPHICS



REVENUE SOURCES