FP TRANSITIONS®

ACQUISITION/MERGER OPPORTUNITY

LOCATION
Southern California

REVENUE
$4,760,000

PRACTICE DESCRIPTION

This RIA firm in Southern California provides more than 675 client households with a broad array of wealth management services, including individualized goal oriented active asset management and financial, tax, accounting, and estate planning services. With 2020 revenue of approximately $4,760,000 from managing approximately $500,000,000 in client assets, this firm would make a great addition to a larger RIA firm seeking a turn-key acquisition opportunity in Southern California with a very strong foundation to build upon.

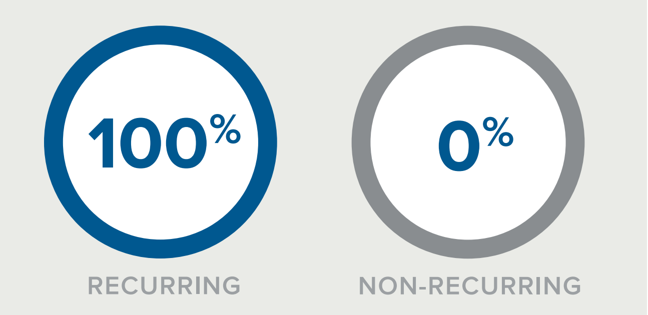
The acquisition/merger partner for this firm must be a RIA with a client-first mentality, a commitment to providing exceptional high-touch client service, and a mature/formalized wealth management strategy that includes active asset management. The acquisition/merger partner must also be able to provide this firm's clients with the same or greater level of comprehensive wealth management service they have come to expect under one roof. This is a Sell and Stay® opportunity with all of the firm's employees, except for the firm's founder, seeking meaningful employment with the acquisition/merger partner firm post-sale.

Please email listings@fptransitions.com a description of your firm and explain your interest in this opportunity.

PRACTICE/SELLER INFORMATION

Entity Type	RIA
Approx. 2020 EBITDA	$2,100,000
Custody	Yes
Current Office Space	Available for lease

REVENUE



GROSS REVENUE