



LOCATION

Central Florida

REVENUE

\$236,136

ASKING

\$550,000

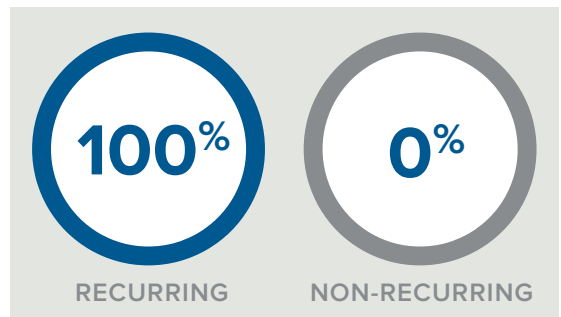
This Central Florida-based RIA provides a select group of 17 households with comprehensive, values-based financial planning and portfolio management services. Trailing 12 months' revenue for this practice is just over \$235,000 from managing approximately \$32 million in assets. The seller describes their 17 household relationships as balanced, stable, low contact, and comfortable with virtual communication.

This is an excellent opportunity for an RIA firm looking to expand or establish a base in the Central Florida market. The ideal acquisition partner would have a CFP® on staff.

PRACTICE INFORMATION

Assets Under Advisory	\$31,919,893
Assets Under Management	\$31,919,893
Households	17
Form of Ownership	S Corporation
Total Number of Employees	1

REVENUE

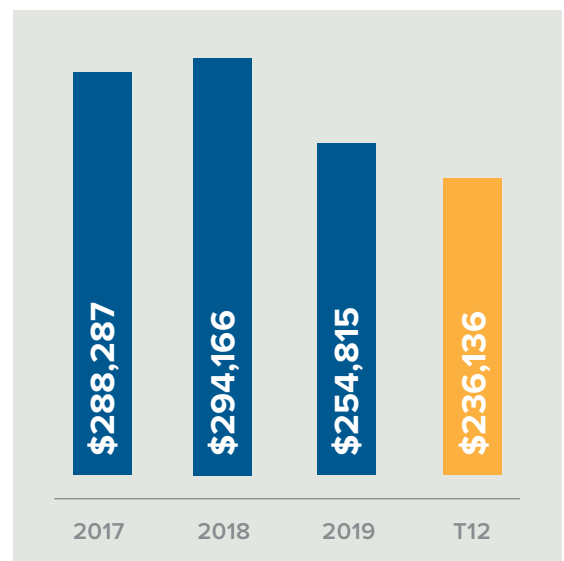


INQUIRE NOW

Visit [fptransitions.com/21-323-inquire](https://fptransitions.com/21-323-inquire) or log in to your member dashboard to inquire.

Not a member? Create your free membership at [fptransitions.com/membership](https://fptransitions.com/membership).

HISTORICAL REVENUE





LOCATION  
Central Florida

REVENUE  
\$236,136

ASKING  
\$550,000

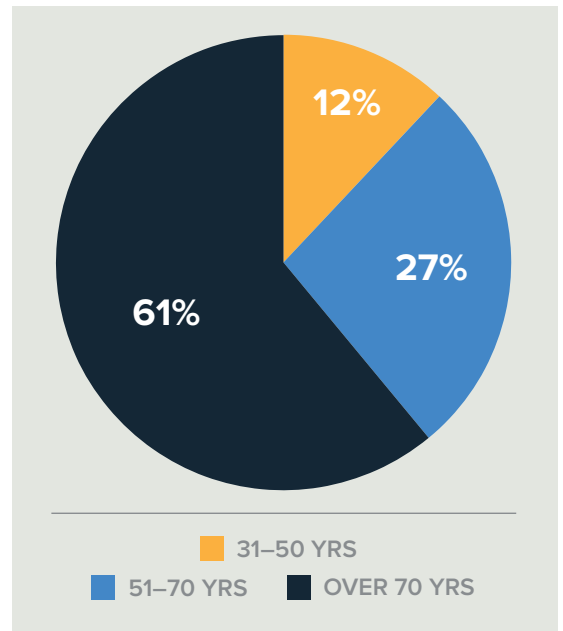
### SELLER INFORMATION

Designations	CFP®
Seller's Age Range	40-45

### SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
<b>FEE-BASED</b>		
Fees from AUM	\$203,118	
Third-Party Assets	\$33,018	
<b>TOTALS</b>		
	<b>\$236,136</b>	

### CLIENT DEMOGRAPHICS



### REVENUE SOURCES

