



LOCATION
Illinois

REVENUE
\$608,534

ASKING
\$1,500,000

This high-touch IAR/RR practice in Illinois takes a consultative family office-style approach to wealth management. They offer, among other things, holistic financial planning and diversified portfolios. The practice services 101 high net worth households which have an average client tenure of 15 years. 2020 year-end annual gross revenue for this practice was approximately \$608,000, of which 85% was generated from managing over \$75 million in assets.

The preferred buyer for this practice would be a mid-sized firm with a CFP® on staff and be committed to providing the seller's clients with the same quality and proactive service they have come to expect. The buyer must be willing to provide the practice's principal with a 3-year glidepath to retirement.

PRACTICE INFORMATION

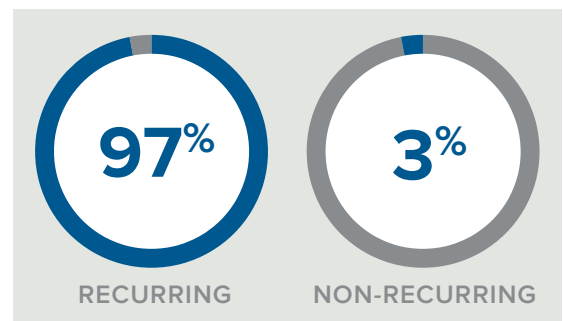
Assets Under Advisory	\$112,334,673
Assets Under Management	\$75,808,101
Households	101
Form of Ownership	LLC
Total Number of Employees	1
Errors & Omissions Insurance	Yes

INQUIRE NOW

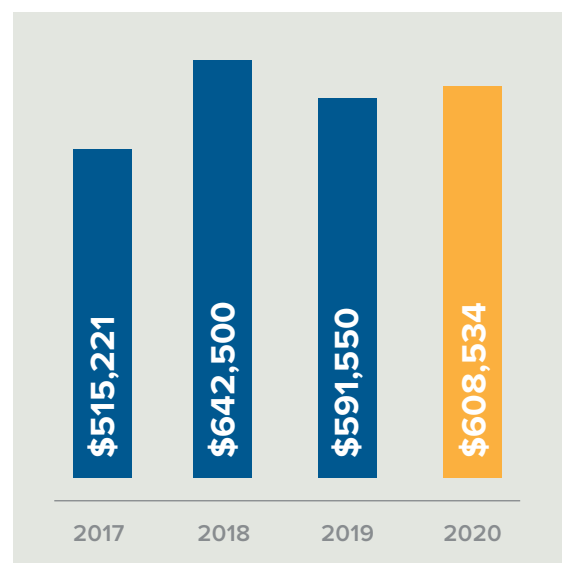
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REVENUE



HISTORICAL REVENUE





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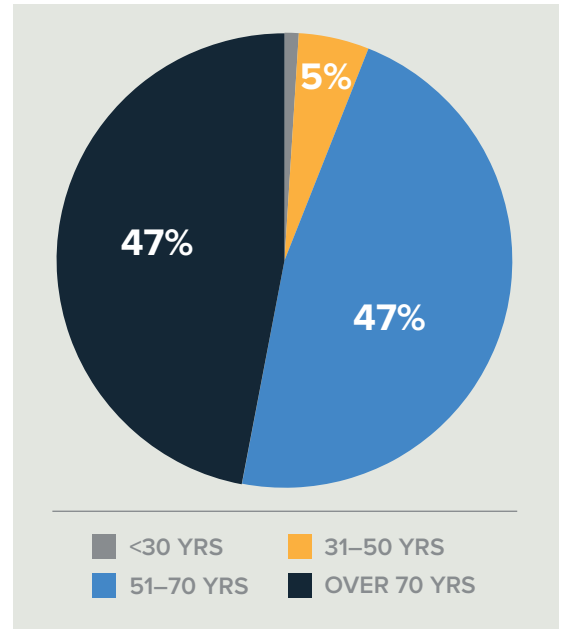
SELLER INFORMATION

Licenses	6, 7, 24,63
Designations	CFP®, ChFC, CLU
Education	Bachelor's Degree
Years in Business	40
Years in Industry	47
Seller's Age Range	70-75
Insurance Lines Carried	Life, Health, Disability, LTC

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$517,039	
SECURITIES-BASED		
Stocks		\$1,489
Mutual Funds	\$14,068	\$4,185
Variable Annuities	\$49,811	\$2,135
Other	\$2,035	\$5,199
INSURANCE-BASED		
Long-Term Care	\$1,556	
Fixed Annuities	\$993	
Other	\$4,986	\$5,038
TOTALS		
	\$590,488	\$18,046

CLIENT DEMOGRAPHICS



REVENUE SOURCES

