FP TRANSITIONS®

LISTING 21-325

LOCATION	REVENUE	ASKING
Northern Bay Area	$635,685	$1,650,000

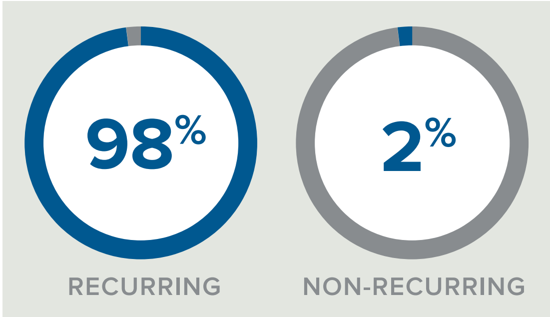
This RIA in the northern San Francisco Bay Area is focused on providing each of its 74 diverse households with a high touch personal wealth management experience. Total revenue for 2020 was $635,685, of which $608,849 was from managing approximately $84 million in assets. With an average client tenure of over 22 years, this practice has a very loyal, low-pressure client base.

The ideal acquisition partner for this practice would be a mid-sized RIA firm with at least one CFP® on staff and an established presence in the area. As a Sell and Stay® opportunity, one of the practice's principals would like to stay on post-sale.

PRACTICE INFORMATION

Assets Under Advisory	$92,697,905
Assets Under Management	$83,845,745
Households	74
Form of Ownership	Partnership
Total Number of Employees	2

REVENUE



INQUIRE NOW

Visit **fptransitions.com/21-325-inquire** or log in to your member dashboard to inquire.

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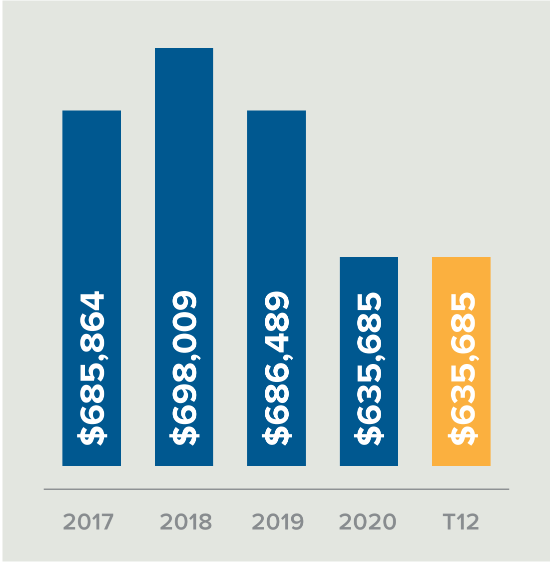
HISTORICAL REVENUE



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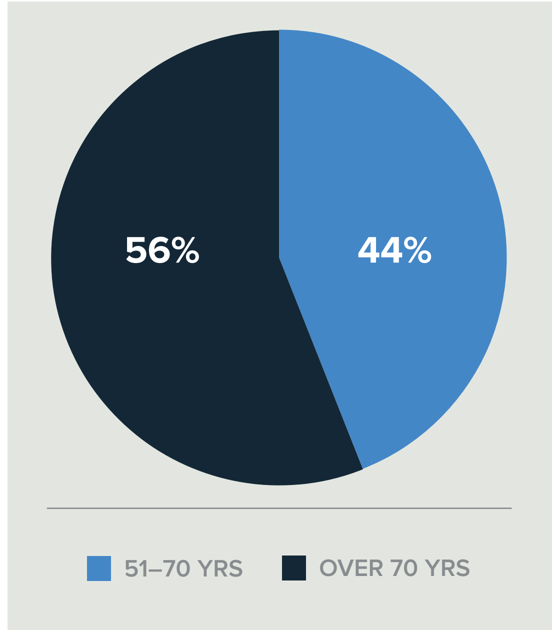
SELLER INFORMATION

Designations	CFP®
Seller's Age Range	65–70
Insurance Lines Carried	Life, Health, Disability, LTC

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$608,849	
INSURANCE-BASED		
Term Life	$320	
Long-Term Care	$6,307	
Disability	$829	
Fixed Annuities	$2,456	$12,000
Other	$4,864	$60
TOTALS		
	$623,625	**$12,060**

CLIENT DEMOGRAPHICS



REVENUE SOURCES