



LOCATION

Central Florida

REVENUE

\$393,511

ASKING

\$1,050,000

This Florida-based practice is focused on providing personalized investment counseling with an emphasis on risk-controlled wealth retention opportunities to a small group of high to ultra-high net worth clients largely based in the mid-Atlantic. With trailing 12 month’s revenue of \$393,511, this practice would make a great addition to a firm with an established family office-style practice.

The ideal acquisition partner for this practice would have an established track record and significant experience working with high to ultra-high net worth clients and have significant experience with, among other things, individual securities, ETFs, international securities, REITs, and private foundations.

PRACTICE INFORMATION

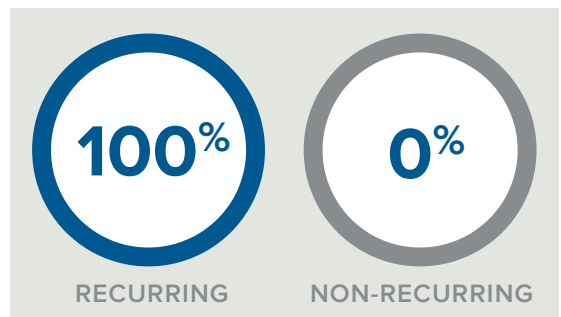
Assets Under Advisory	\$48,027,326
Assets Under Management	\$48,027,326
Households	12
Form of Ownership	LLC
Total Number of Employees	2

INQUIRE NOW

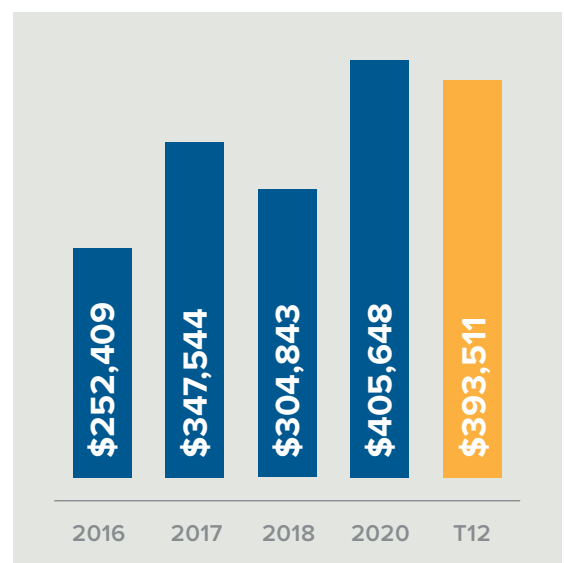
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REVENUE



HISTORICAL REVENUE





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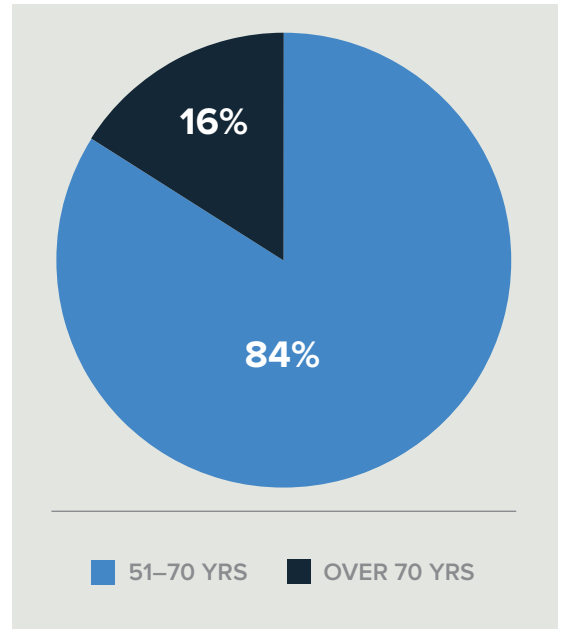
SELLER INFORMATION

Designations	ChFC
Education	Bachelor's Degree
Years in Industry	36
Seller's Age Range	55-60

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$393,511	
TOTALS		
	\$393,511	

CLIENT DEMOGRAPHICS



REVENUE SOURCES

