



LOCATION
Southern CA

REVENUE
\$771,469

ASKING
\$1,900,000

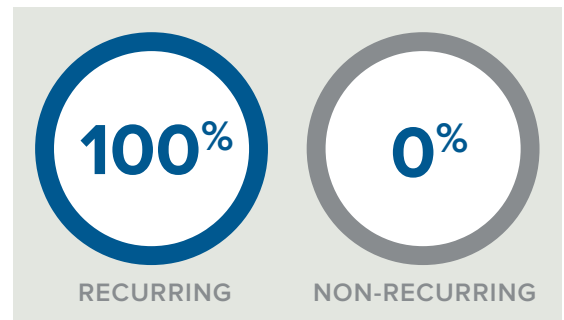
This RIA practice based in Southern California provides individualized investment management, financial planning, and personalized CFO services to its 64 high net worth households. The trailing 12 revenue for this practice is \$771,469 from managing over \$120 million in assets.

The ideal buyer would be committed to providing the practice’s clients with the same personalized family office-style service they have come to expect. The ideal buyer would also assume the practice’s current office space.

PRACTICE INFORMATION

Assets Under Advisory	\$121,500,000
Assets Under Management	\$121,500,000
Households	64
Form of Ownership	S Corporation
Total Number of Employees	3
Billing Management Software	Tamarac

REVENUE

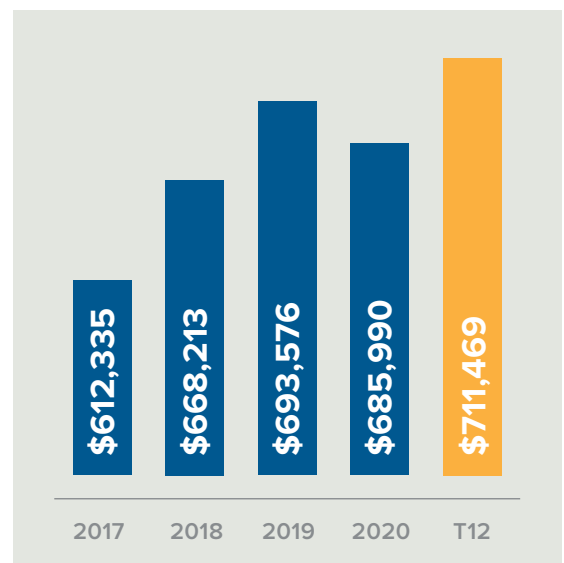


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HISTORICAL REVENUE





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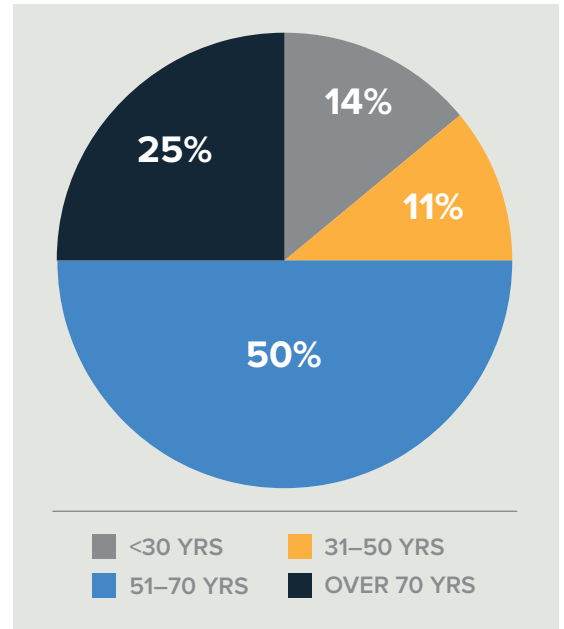
SELLER INFORMATION

Education	Master's Degree
Years in Business	28
Years in Industry	29
Seller's Age Range	55-60

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$711,469	
TOTALS		
	\$711,469	

CLIENT DEMOGRAPHICS



REVENUE SOURCES

