



LOCATION

Southern California

REVENUE

\$803,935

ASKING

\$2,200,000

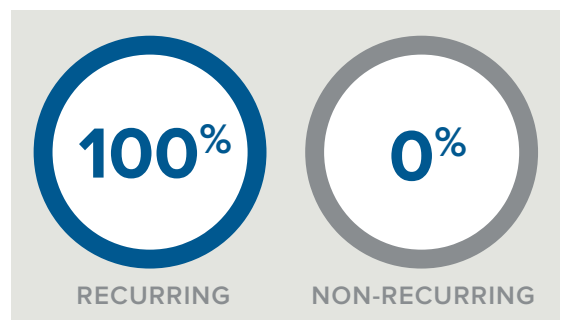
This boutique RIA practice located northeast of downtown Los Angeles provides bespoke investment management, financial planning, and pension consulting to its 173 households. 2020 revenue for this practice was \$803,935, 98% of which was from managing approximately \$127 million in assets.

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. This is a Sell and Stay® opportunity as the principal would like a glidepath to retirement over the next 3-5 years.

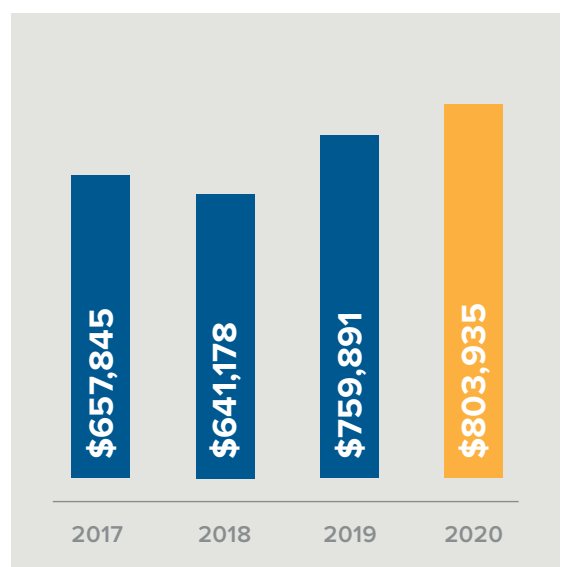
PRACTICE INFORMATION

Assets Under Advisory	\$127,530,002
Assets Under Management	\$127,530,002
Households	173
Form of Ownership	S Corp.
Total Number of Employees	2
Billing Management Software	Orion

REVENUE



HISTORICAL REVENUE



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LOCATION  
Southern California

REVENUE  
\$803,395

ASKING  
\$2,200,000

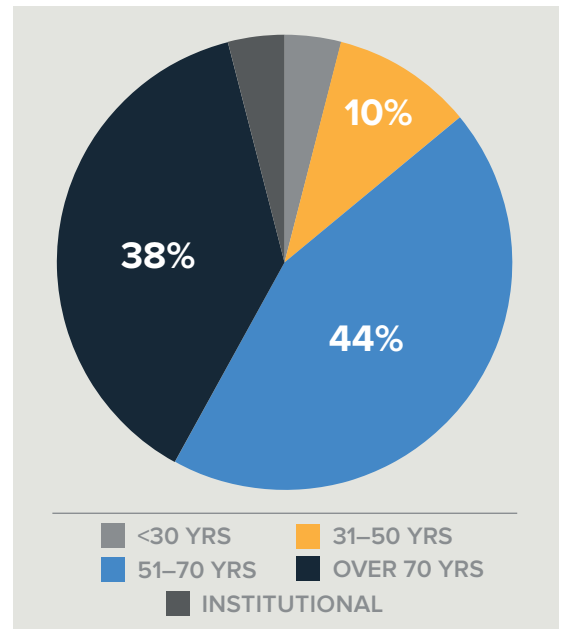
### SELLER INFORMATION

Licenses	63, 65
Education	Bachelor's Degree
Years in Business	17
Years in Industry	40
Seller's Age Range	65-70
Insurance Lines Carried	Life, Health, Disability, LTC

### SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
<b>FEE-BASED</b>		
Fees from AUM	\$760,961	
401K Plans	\$26,044	
<b>SECURITIES-BASED</b>		
Variable Annuities	\$16,931	
<b>TOTALS</b>		
	<b>\$803,395</b>	

### CLIENT DEMOGRAPHICS



### REVENUE SOURCES

