FP TRANSITIONS®

LISTING 21-331

LOCATION	REVENUE	ASKING
DC Area	$445,471	$1,100,000

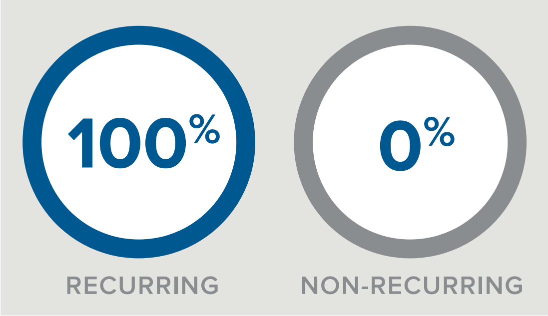
This Northern D.C. metro area fee-only RIA is focused on providing its 49 households with goal-based comprehensive financial planning and portfolio management, including tax and estate planning assistance. Trailing 12 months' gross revenue for this practice is approximately $445,000 on assets of $71.5 million.

The preferred buyer would be a fee-only RIA with a mature business vision and a high-touch family office style service model that uses Schwab as their primary custodian. This is a Sell and Stay® opportunity as one of the practice's principals and a employee seek to remain with the acquiring firm post-sale. The remaining principal is a highly-qualified CFA with a 20-year tenure with the practice. The employee has a 30-year tenure with the practice and provides invaluable employee and client support.

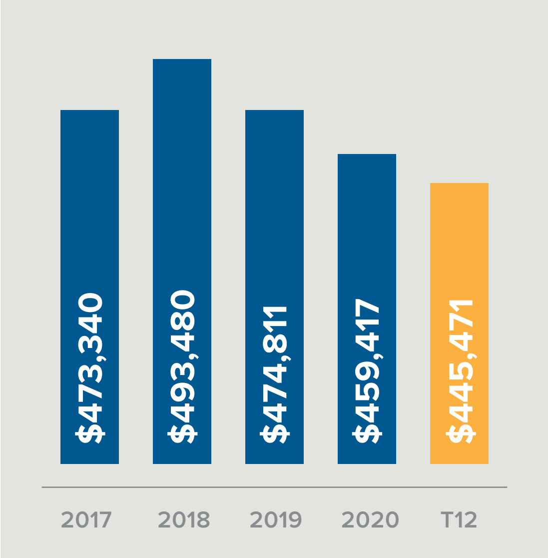
PRACTICE INFORMATION

Assets Under Advisory	$71,595,718
Assets Under Management	$71,595,718
Households	49
Form of Ownership	S Corp.
Total Number of Employees	3
Billing Management Software	Portfolio Center

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit **fptransitions.com/21-331-inquire** or log in to your member dashboard to inquire.

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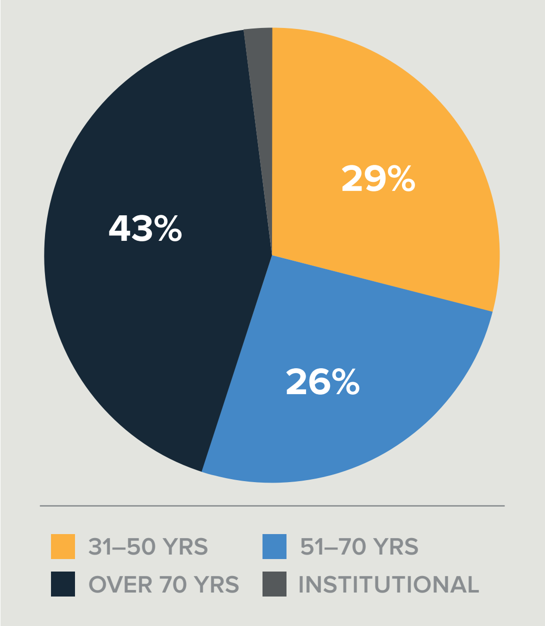
DC Area	$445,471	$1,100,000

SELLER INFORMATION

Licenses	65
Education	JD, Bacherlor’s Degree
Years in Industry	35

CLIENT DEMOGRAPHICS



SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$445,471	
TOTALS		
	$445,471	

REVENUE SOURCES