FP TRANSITIONS®

LISTING 21-332

LOCATION	REVENUE	ASKING
Seattle Metro Area	$134,227	$350,000

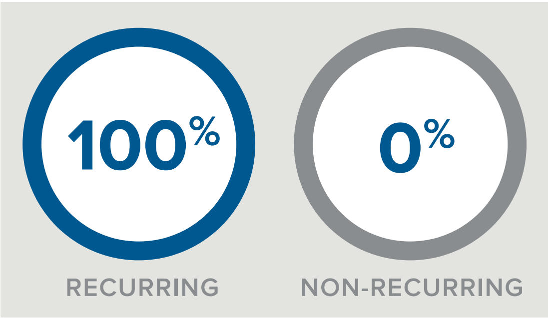
This fee-only RIA practice based in the Seattle metro area offers comprehensive financial planning and portfolio management to its 71 client households. The practice has a strong and stable client base with an average client tenure of over 16 years. This practice's 2020 gross revenue was approximately $135,000 from managing just over $20 million in client assets on a discretionary basis.

The ideal acquisition partner for this practice would be an established RIA that custodies at TD Ameritrade or Schwab. The seller would prefer that the buyer have a CFP® on staff. The buyer should also have or be willing to establish a local office presence in the Seattle area and provide the clients the same level of welcoming, personalized service they have come to expect.

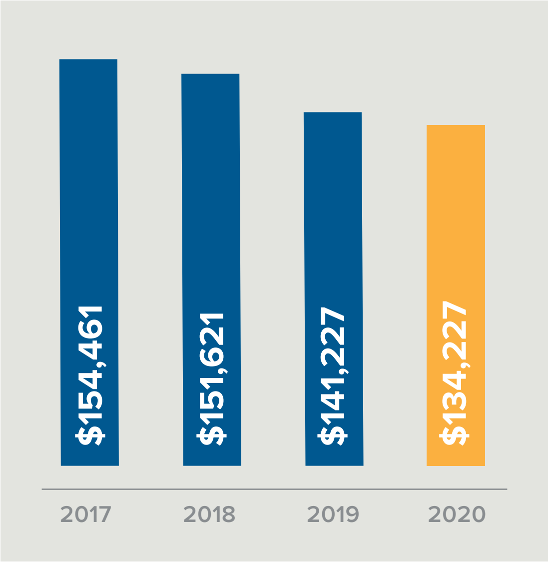
PRACTICE INFORMATION

Assets Under Advisory	$21,343,600
Assets Under Management	$21,343,600
Form of Ownership	LLC
Total Number of Employees	1
Billing Management Software	Panoramix

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

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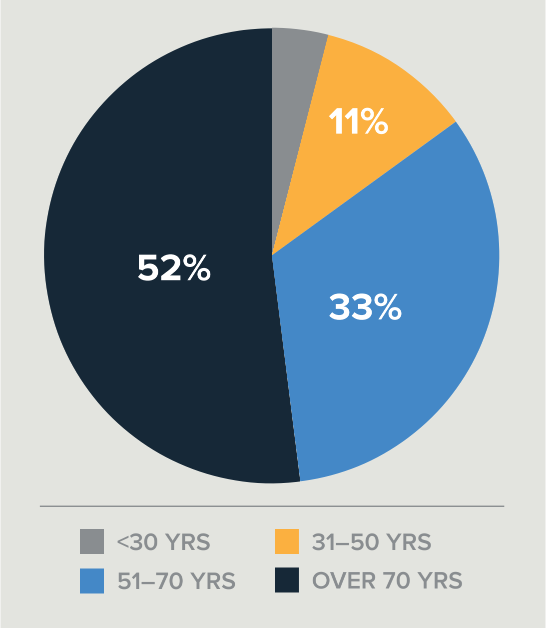
SELLER INFORMATION

Licenses	63
Designations	CFP®
Education	Associate's Degree
Years in Industry	46
Seller's Age Range	75-80

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$134,227	
TOTALS		
	$134,227	

CLIENT DEMOGRAPHICS



REVENUE SOURCES