



LOCATION

Southern Louisiana

REVENUE

\$4,956,370

PRACTICE DESCRIPTION

This hybrid RIA firm in southern Louisiana is focused on providing comprehensive planning and wealth management services to its approximately 340 client households. The cornerstone of this firm is its trusted team of credentialed planners and support staff that provides expert guidance to clients and assist them with navigating life’s planned and unplanned events. The firm’s trailing 12-month gross revenues are around \$4,960,000, of which roughly 74% is from managing approximately \$512,000,000 in assets and \$750,000 from recurring planning fees. This firm would make a great addition to a larger hybrid RIA firm seeking a turn-key acquisition opportunity in southern Louisiana with a very strong team and a foundation in place.

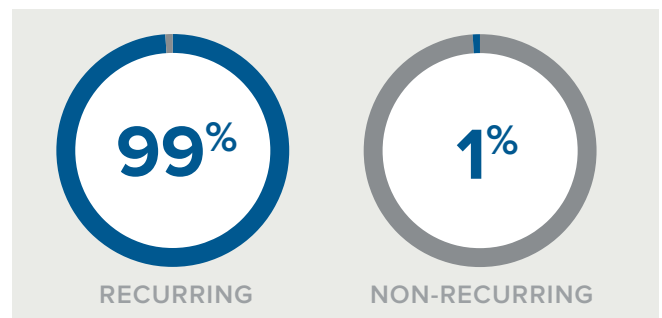
The acquisition/merger partner for this firm must be a client-centric planning focused hybrid RIA that can provide this firm’s clients with the same or greater level of service. This is a Sell and Stay® opportunity with all of the firm’s employees seeking meaningful employment with the acquisition/merger partner firm post-sale.

Please email [listings@fptransitions.com](mailto:listings@fptransitions.com) a description of your firm and explain your interest in this opportunity.

PRACTICE/SELLER INFORMATION

Entity Type	Hybrid RIA
Current Recasted EBITDA	\$1,973,511
Current Office Space	Available for lease

REVENUE



GROSS REVENUE

