FP TRANSITIONS®

LISTING 21-339

LOCATION	REVENUE	ASKING
Chicago Metro Area	$694,783	$1,200,000

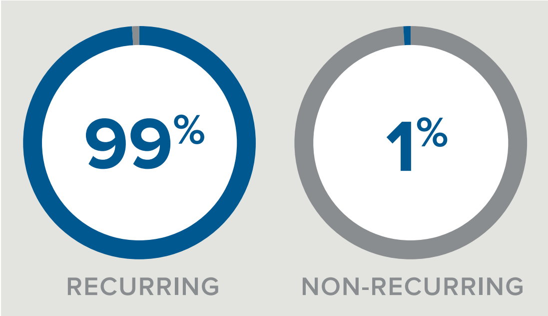
This boutique hybrid RIA based in the Chicago metro area is focused on providing its clients with generational financial planning. Most of the practice's clients are concentrated in Illinois, Florida, New Hampshire, and California. The practice generated $694,783 in revenue in 2020 from servicing their loyal client base of 66 households that have an average tenure with the practice of 15 years.

The ideal acquisition partner for this practice would be a mid-sized planning centric hybrid RIA. The acquiring firm should have a CFP® on staff and be willing to retain two staff members, one of whom is a CFP®.

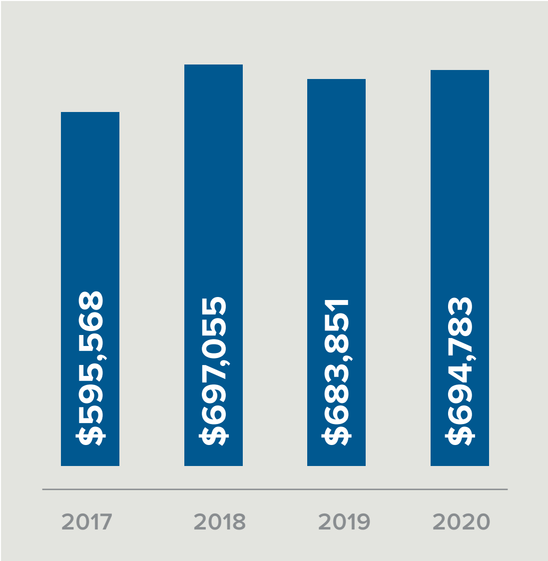
PRACTICE INFORMATION

Assets Under Advisory	$98,800,000
Assets Under Management	$6,000,000
Form of Ownership	Sole Prop.
Total Number of Employees	3
Number of Branch Offices	2

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit fptransitions.com/21-339-inquire or log in to your member dashboard to inquire.

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Chicago Metro Area	$694,783	$1,200,000

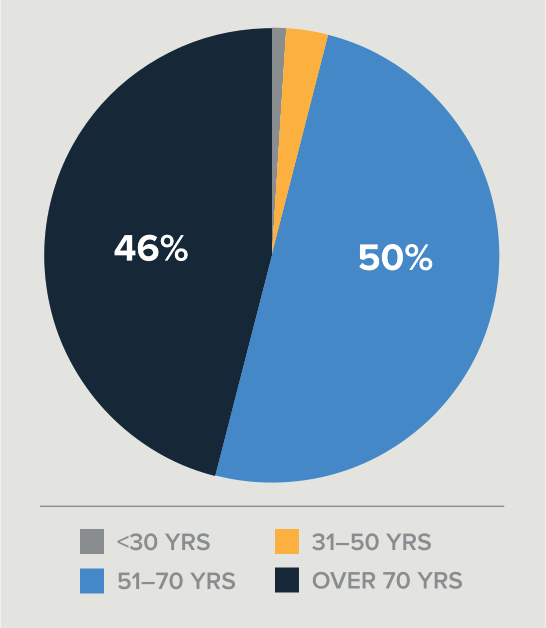
SELLER INFORMATION

Licenses	7, 24, 63
Designations	CFP®, ChFC®, CLU®, MBA
Education	Masters Degree
Years in Industry	33
Seller's Age Range	70-75
Insurance Lines Carried	Life, Disability

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$63,962	
SECURITIES-BASED		
Bonds		$1,667
Mutual Funds	$170,771	
HOURLY-BASED		
Financial Planning	$455,400	
INSURANCE-BASED		
Whole Life		$316
Other		$2,667
TOTALS		
	$690,133	**$4,650**

CLIENT DEMOGRAPHICS



REVENUE SOURCES