



LOCATION
Kentucky

REVENUE
\$274,684

ASKING
\$675,000

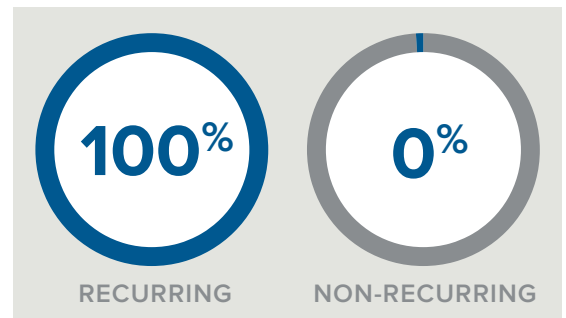
This Kentucky-based RIA provides tailored asset management and pension consulting services to clients. The practice’s trailing 12-month revenues are over \$270,000 generated from managing over \$55 million in assets for 41 client households, some of whom are expected to inherit large estates over the next several years.

This is a Sell and Stay® opportunity as the practice’s principal is looking for a 3-5 year glidepath to retirement. The ideal buyer would be a mid-sized RIA that has a client-centric service model and a national presence as the practice’s clients are not centralized in Kentucky.

PRACTICE INFORMATION

Assets Under Advisory	\$54,287,449
Assets Under Management	\$54,287,449
Form of Ownership	S Corp.
Total Number of Employees	2
Billing Management Software	Portfolio Center

REVENUE

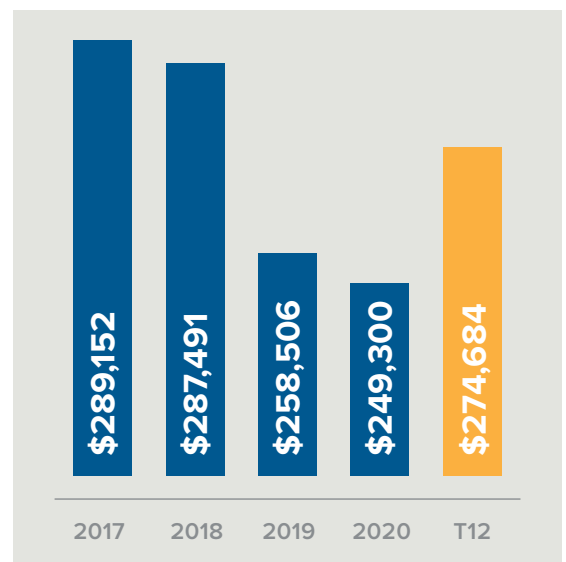


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HISTORICAL REVENUE





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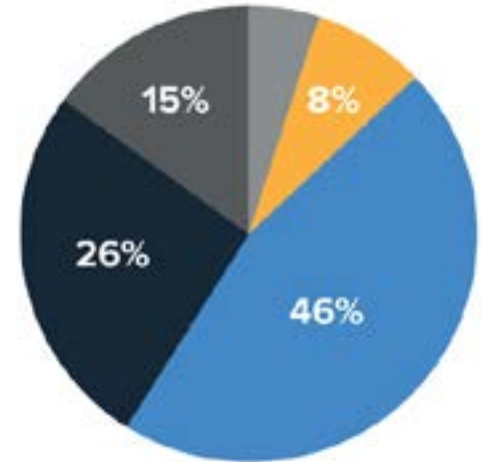
SELLER INFORMATION

Licenses	65
Designations	MBA
Education	Master's Degree
Years in Industry	42
Seller's Age Range	60-65

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$274,684	
HOURLY-BASED		
INSURANCE-BASED		
TOTALS		
	\$274,684	

CLIENT DEMOGRAPHICS



<30 YRS
 31-50 YRS
 51-70 YRS
 OVER 70 YRS
 INSTITUTIONAL

REVENUE SOURCES

