



LOCATION
Colorado

REVENUE
\$658,003

ASKING
\$1,750,000

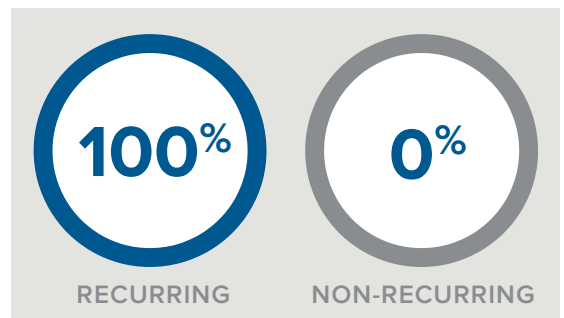
This Colorado-based RIA is focused on providing comprehensive planning and investment management services to its 79 households, most of whom are individuals and business owners located in Colorado’s resort communities. This RIA does not believe in a one-size-fits-all approach and thus tailors its planning and investment management services to the individualized needs of each client in order to help them achieve their short and long-term financial goals. With approximately \$650,000 in revenue in 2020 from managing over \$74 million in assets, this RIA would make a great addition to a firm looking to expand its presence in Colorado.

The preferred buyer would be a client-centric RIA firm that provides a customized, high-touch client experience. The preferred buyer would have at least one CFP® and ideally a CFA® or CIMA® on staff and have experience with closely held businesses and multi-generational planning. The principal of this RIA would like to retire shortly after the clients have been transitioned.

PRACTICE INFORMATION

Assets Under Advisory	\$74,221,000
Assets Under Management	\$74,221,000
Form of Ownership	S Corp.
Total Number of Employees	3
Billing Management Software	Portfolio Center

REVENUE

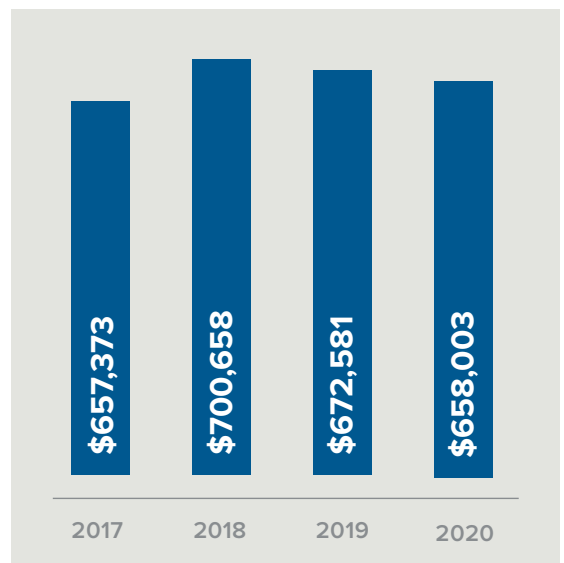


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HISTORICAL REVENUE





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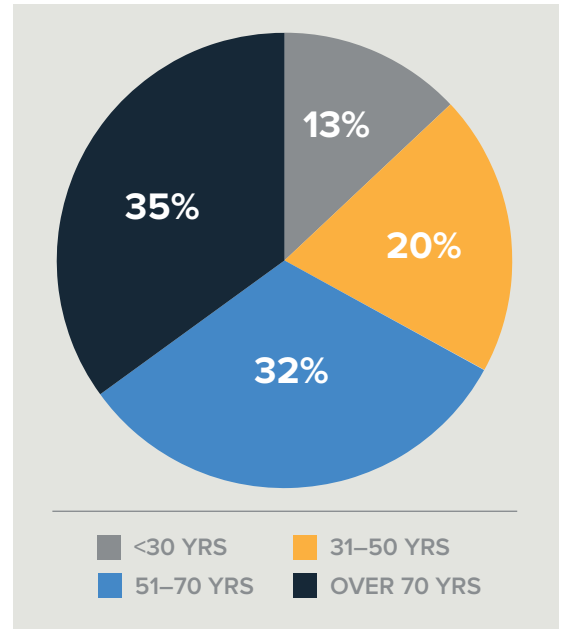
SELLER INFORMATION

Designations	CFP®, CLU®, CIMA®, MSF
Education	Master's Degree
Years in Industry	30
Seller's Age Range	65-70
Insurance Lines Carried	Life, Health, Disability, LTC

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$650,117	
Other	\$4,931	
HOURLY-BASED		
Financial Planning		\$500
INSURANCE-BASED		
Other	\$2,455	
TOTALS		
	\$657,503	\$500

CLIENT DEMOGRAPHICS



REVENUE SOURCES

