LISTING 21-346

FP TRANSITIONS®

LOCATION	REVENUE	ASKING
Wisconsin	$405,926	$1,050,000

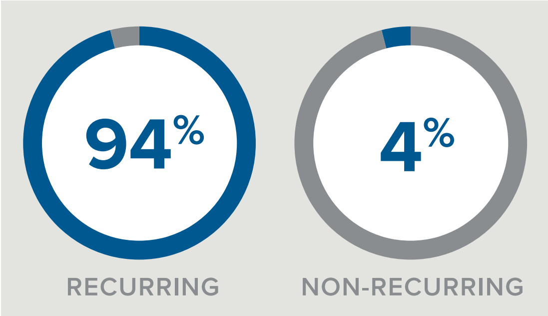
This Wisconsin-based RIA provides its clients with comprehensive financial planning, investment advisory, insurance, and tax preparation services. This practice builds model portfolios for clients mainly consisting of mutual funds and ETFs and has long-tenured relationships with its 113 client households. The trailing 12-month revenue for this practice is $405,926, approximately 96% of which was from managing over $53 million in assets.

The ideal acquisition partner for this practice would be a firm with a proven track record of providing a high-touch, personalized client experience with a comprehensive suite of services and a deep bench. The ideal partner firm would have at least one CFP® on staff and a staff member that is knowledgeable on insurance products.

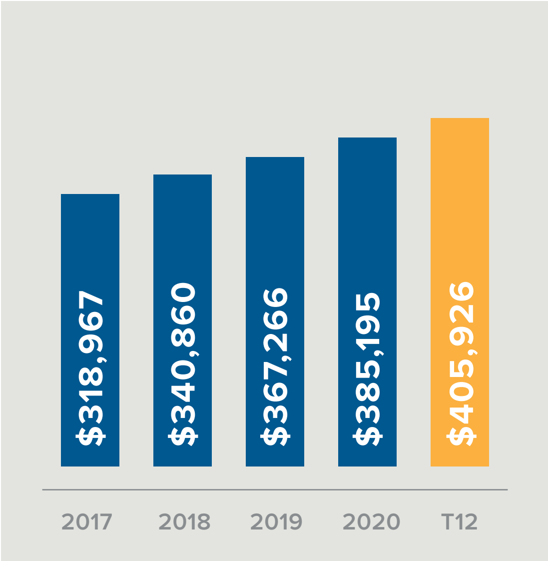
PRACTICE INFORMATION

Assets Under Advisory	$53,105,562
Form of Ownership	S Corp.
Total Number of Employees	1

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

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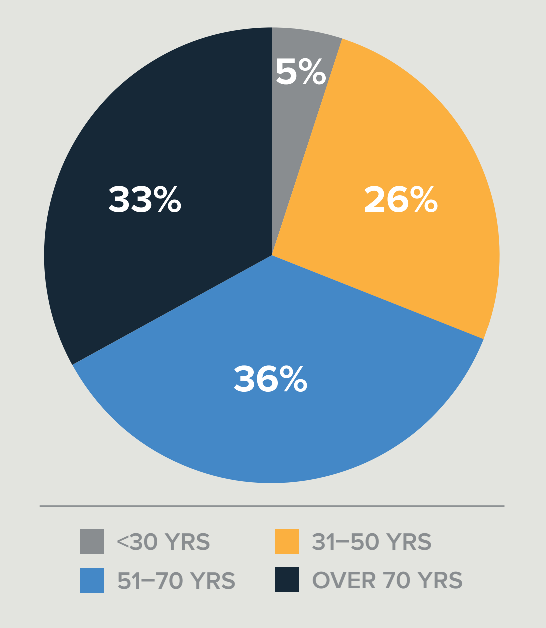
SELLER INFORMATION

Licenses	65
Designations	CFP®
Education	Bachelor's Degree
Years in Industry	33
Seller's Age Range	60-65
Insurance Lines Carried	Life, Health, Annuity

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$389,689	
INSURANCE-BASED		
Term Life		$280
Fixed Annuities		$15,957
TOTALS		
	$389,689	**$16,237**

CLIENT DEMOGRAPHICS



REVENUE SOURCES