FP TRANSITIONS®

LISTING 21-347

LOCATION	REVENUE	ASKING
Southern California	$608,467	$1,500,000

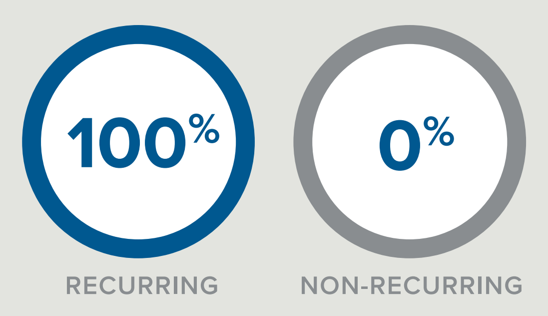
This Los Angeles-based state registered hybrid RIA offers bespoke wealth management services to its 73 client households. This practice generates $608,467 in trailing 12-month revenues from managing approximately $50 million in assets on a discretionary basis and $25 million on a non-discretionary basis. This is a great acquisition opportunity for a firm looking to expand or establish their footprint in Los Angeles.

The ideal buyer would be a hybrid RIA with an established custodial relationship with Charles Schwab, an active management style, and is willing to retain one seasoned advisor employee post-sale.

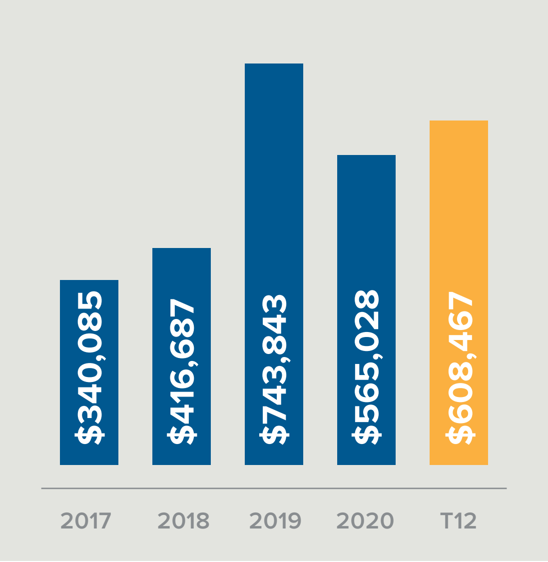
PRACTICE INFORMATION

Assets Under Advisory	$89,000,000
Assets Under Management	$78,000,000
Households	73
Form of Ownership	C Corp.
Total Number of Employees	4
Billing Management Software	Orion Advisors

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit **fptransitions.com/21-347-inquire** or log in to your member dashboard to inquire.

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Southern California	$608,467	$1,500,000

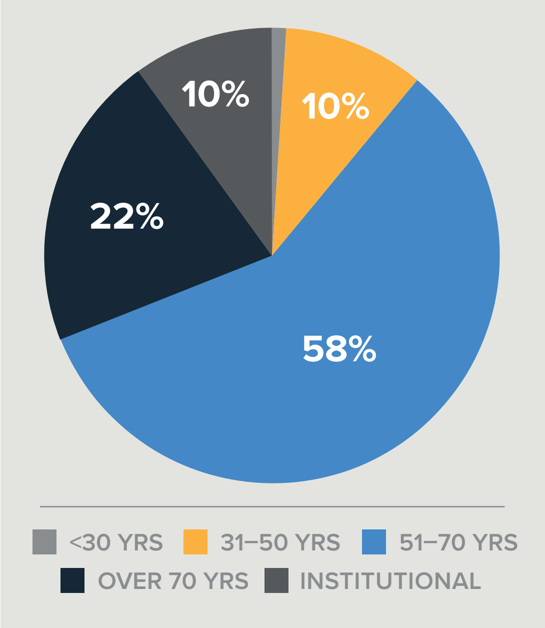
SELLER INFORMATION

Education	Master's Degree
Years in Industry	14
Seller's Age Range	40-45

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$608,467	
TOTALS		
	$608,467	

CLIENT DEMOGRAPHICS



REVENUE SOURCES