FP TRANSITIONS®

LISTING 21-348

LOCATION	REVENUE	ASKING
Texas	$199,588	$500,000

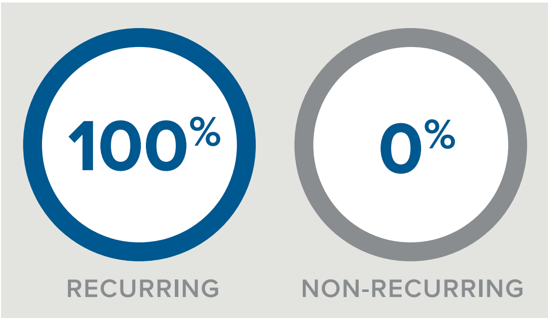
This boutique RIA based in the Dallas-Fort Worth area is focused on providing their clients with a customized, comprehensive financial plan and expert investment advice. This practice's typical client is looking for long-term financial security. The practice generated $199,588 in trailing 12-month revenues from managing $21,131,000 in assets for their 45 households.

This is a Sell and Stay® opportunity as the practice's principals are both looking for a glide path to retirement. The ideal buyer for this practice would be an RIA with a CFP® in leadership or on staff and a "client-first" mentality. The sellers would prefer a buyer that has an existing or would be willing to establish a local office.

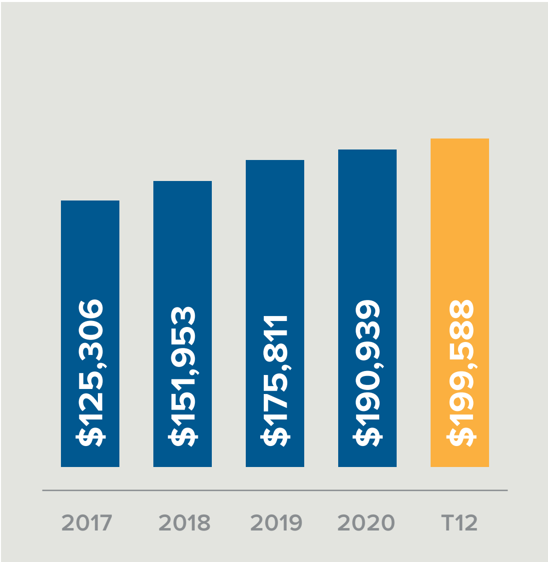
PRACTICE INFORMATION

Assets Under Advisory	$21,131,000
Assets Under Management	$21,131,000
Households	45
Form of Ownership	LLC
Number of Owners	2
Billing Management Software	Trade PMR

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit fptransitions.com/21-348-inquire or log in to your member dashboard to inquire.

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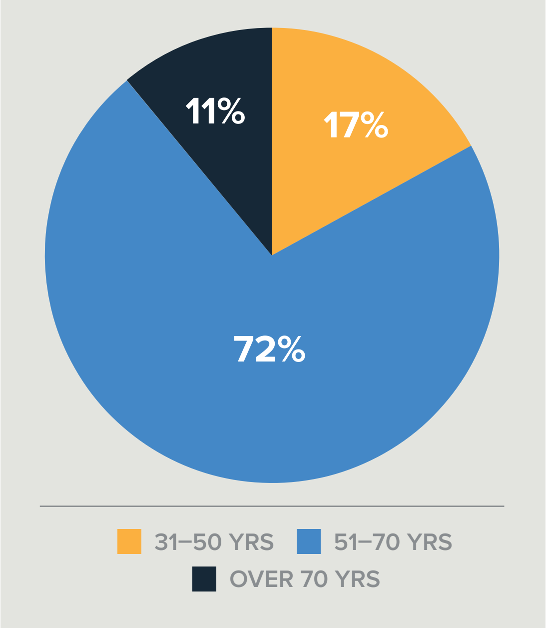
SELLER INFORMATION

Licenses	6, 7, 63, 65, 66
Designations	CFP®
Education	Master's Degree
Years in Industry	33
Seller's Age Range	65-69

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$190,564	
401K Plans	$9,024	
TOTALS		
	$199,588	

CLIENT DEMOGRAPHICS



REVENUE SOURCES