LISTING 21-351

LOCATION	REVENUE	ASKING
Western Michigan	$837,605.00	$2,500,000.00

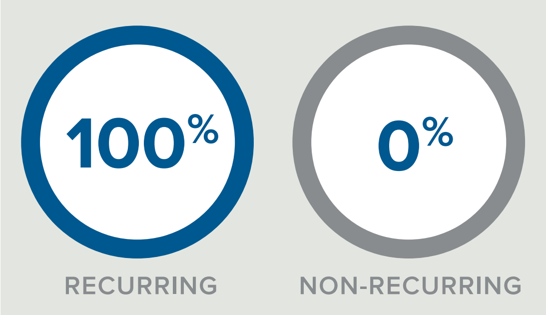
This fee-only RIA based in western Michigan provides financial planning and investment management services to its 192 household clients. Client portfolios mainly consist of mutual funds, ETFs, and other individual securities. The firm is committed to the fiduciary model and continuing to research, learn, and grow to provide a caring, personal connection with their clients. This practice's trailing 12-month revenue is $837,605 from managing over $110 million in assets.

This is a Sell and Stay® opportunity with two of the practice's principals seeking meaningful post-sale employment and a pathway to equity with the acquiring firm. The ideal acquisition partner would be a fee-only fiduciary RIA with at least one CFP® on staff, have an established custodial relationship with TD Ameritrade, and have a demonstrated track record of providing quality service to its clients.

PRACTICE INFORMATION

Assets Under Advisory	$115,618,715
Assets Under Management	$105,736,472
Households	192
Form of Ownership	C Corp.

REVENUE



INQUIRE NOW

Visit fptransitions.com/21-351-inquire or log in to your member dashboard to inquire.

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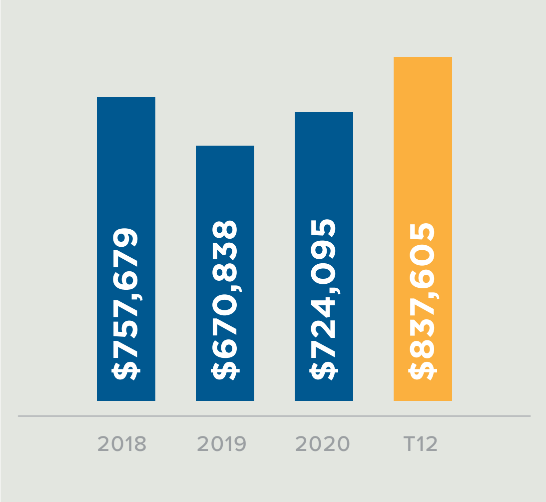
HISTORICAL REVENUE



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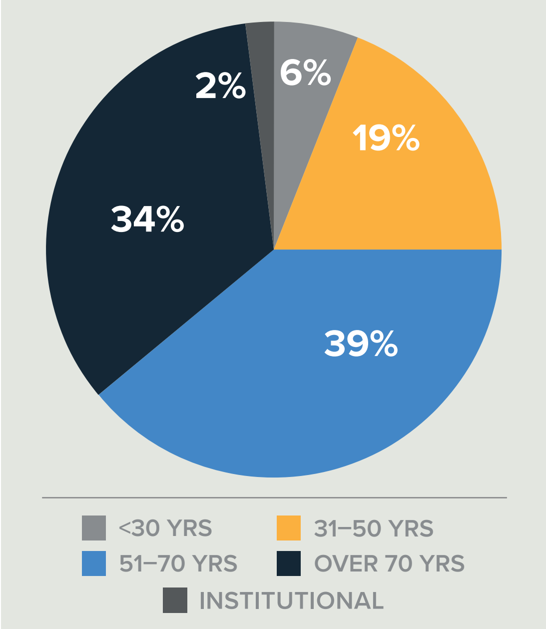
SELLER INFORMATION

Licenses	7, 24, 65, 66
Designations	ChFC, CLU, MSFS, CExP

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$554,984	
401K Plans	$282,621	
TOTALS		
	$837,605	

CLIENT DEMOGRAPHICS



REVENUE SOURCES