FP TRANSITIONS®

LISTING 21-352

LOCATION	REVENUE	ASKING
Central Florida	$417,555.00	$1,200,000.00

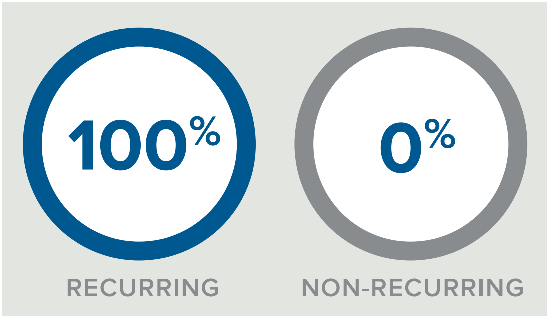
This fee-only RIA based in Central Florida is focused on providing its 115 client households with holistic financial planning and tax services on a flat fee or annual retainer basis. The practice's client base is largely concentrated in Florida and California but would benefit from a partner firm with a national presence. The practice's trailing 12-month revenue is $417,555 with over $125 million in client assets.

The ideal acquisition partner for this practice would be a firm that offers fee-only service, tax preparation, and has a custodial relationship with Charles Schwab. The seller would also prefer a partner firm that offers customized client portfolios or has multiple portfolio options and a firm that has at least one team member that is an enrolled agent.

PRACTICE INFORMATION

Assets Under Advisory	$125,445,466
Assets Under Management	$125,455,466
Households	115
Form of Ownership	LLC
Total Number of Employees	3

REVENUE

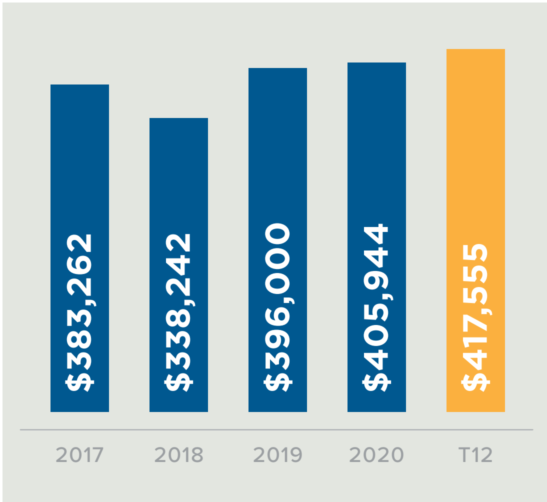


INQUIRE NOW

Visit fptransitions.com/21-352-inquire or log in to your member dashboard to inquire.

Not a member? Create your free membership at fptransitions.com/membership.

HISTORICAL REVENUE



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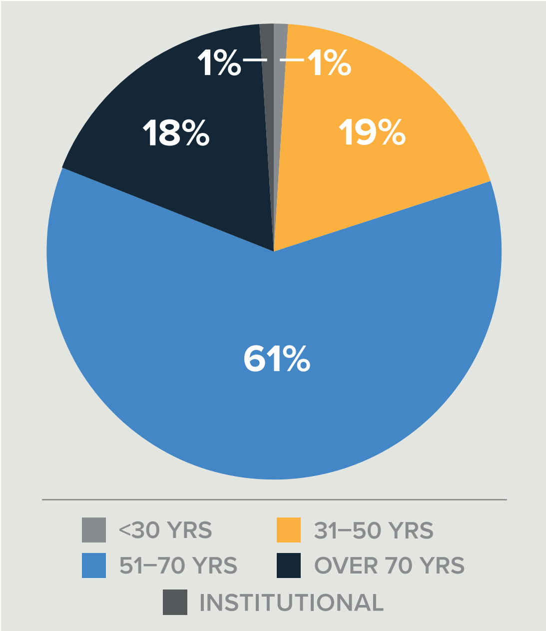
SELLER INFORMATION

Designations	CFP, MBA, EA
Education	Master's Degree
Years in Industry	23

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$417,555	
TOTALS		
	$417,555	

CLIENT DEMOGRAPHICS



REVENUE SOURCES