FP TRANSITIONS®

LISTING 21-354

LOCATION
San Francisco Bay Area

T12 REVENUE
$3,400,000.00

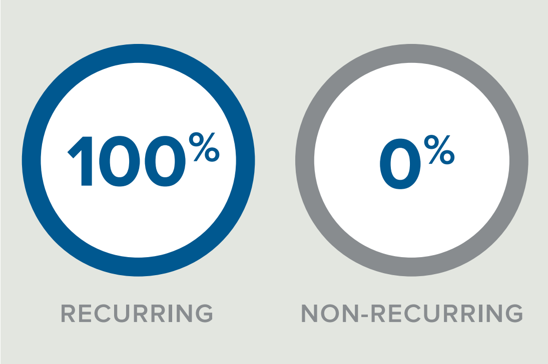
This fee-only, fiduciary RIA based in the San Francisco Bay Area is focused on providing well-reasoned and experienced financial guidance to its 284 client households. The firm's principals take great pride in tailoring their financial planning and investment management services to the individualized needs of each client. This firm currently generates approximately $3.4 million in revenue from managing over $513 million in client assets. Established more than 30 years ago, this firm has deep roots in its local community and well-established referral networks.

The acquisition partner for this firm must be a mid-sized planning-focused fee-only RIA with a client-centric service model. The principals of this firm are not interested in partnering with a firm that seeks themselves to be acquired in the next 5 years or that is seeking acquisition opportunities solely for the purpose of increasing shareholder profits. This is a Sell and Stay® opportunity with the firm's principals and staff seeking meaningful employment post-sale.

FIRM INFORMATION

Entity Type	RIA
Est. 2021 Gross Revenue	$3,400,000
Est. Non-Recasted 2021 EBOC	$2,000,000
Est. Non-Recasted 2021 EBITDA	$1,400,000

REVENUE



INQUIRE NOW

Visit fptransitions.com/21-354-inquire or log in to your member dashboard to inquire.

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

HISTORICAL REVENUE