FP TRANSITIONS®

LISTING 21-356

LOCATION	REVENUE	ASKING
Portland Metro Area	$512,462.00	$1,300,000.00

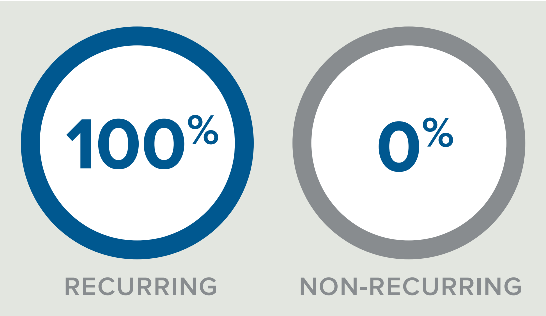
This fee-only RIA practice based in the Portland, Oregon Metro area is focused on providing discretionary investment advisory services to its 80 household clients. The client base for this practice is located primarily in the Pacific Northwest. This practice is recorded 2021 revenues of over $510,000 from managing $40 million in assets.

The ideal acquisition partner for this practice would be a fee-only or hybrid RIA with a clean compliance history and an established custodial relationship with TD Ameritrade. This is a traditional sale, with the principal of this practice seeking an exit after the client relationships have been transitioned to the acquiring firm.

PRACTICE INFORMATION

Assets Under Management	$40,000,000
Households	80
Form of Ownership	S Corp.
Billing Management Software	Portfolio Center

REVENUE



INQUIRE NOW

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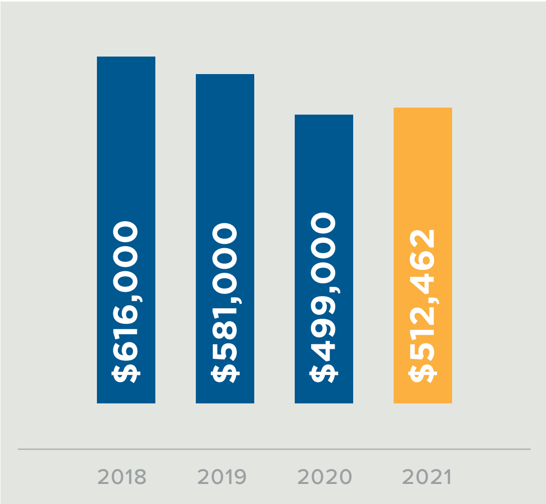
HISTORICAL REVENUE



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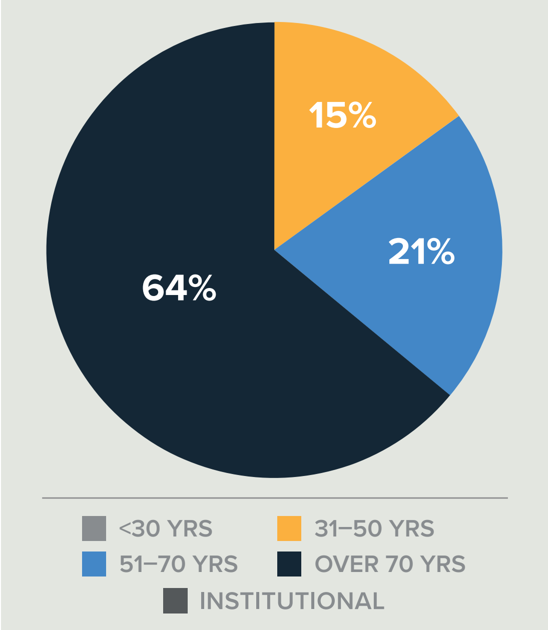
SELLER INFORMATION

Licenses	65
Years in Industry	20

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$512,462	
TOTALS		
	$512,462	

CLIENT DEMOGRAPHICS



REVENUE SOURCES