



LOCATION

Central Pennsylvania

GROSS REVENUE

\$447,212.00

ASKING

\$975,000.00

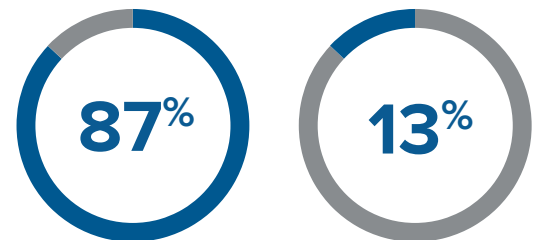
This hybrid RIA based in Central Pennsylvania specializes in the selection and active management of individual stocks and laddered bonds for its clients. This practice generated approximately \$450,000 in revenue in 2021 from servicing their roughly 100 client households. Approximately 87% of this practice’s revenue is from managing \$56 million in assets with the remaining revenue from commissions and transaction charges.

This is an ideal opportunity for a Hybrid RIA looking to expand or establish a location in the heart of the northeast. The ideal acquisition partner firm would have a demonstrated track record of securities and bond selection and management.

PRACTICE INFORMATION

Total Investor Assets	\$64,876,000
Assets Under Active Management	\$56,305,000
Households	100+
Form of Ownership	C Corp.
Total Number of Staff	3

REVENUE



RECURRING

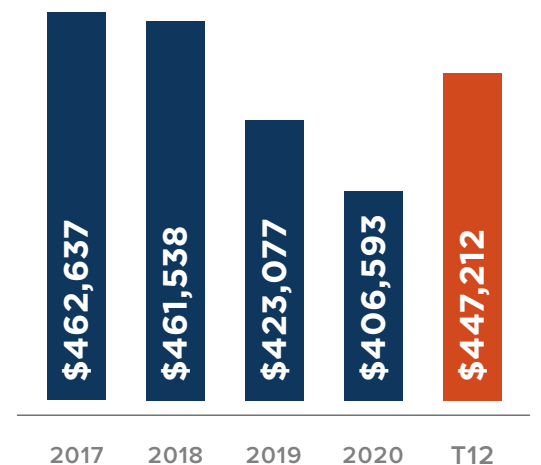
NON-RECURRING

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HISTORICAL REVENUE





LOCATION Central Pennsylvania	GROSS REVENUE \$447,212.00	ASKING \$975,000.00
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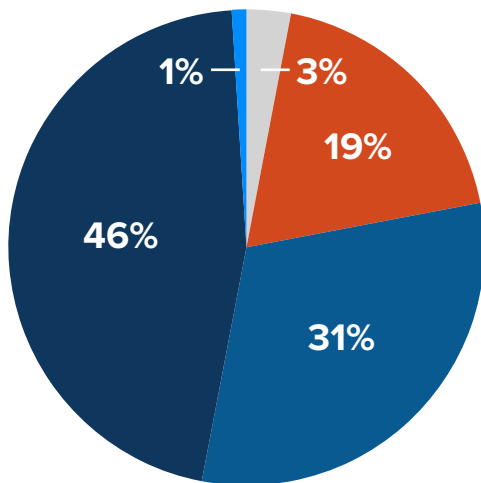
SELLER INFORMATION

Licenses	4, 5, 7, 24, 27, 52, 53, 63, 65, 66
Designations	MBA

SOURCES OF REVENUE

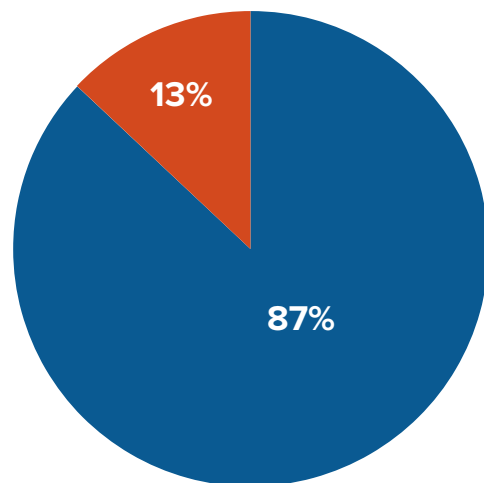
	NET RECURRING REVENUE	GROSS NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	\$389,024	
SECURITIES-BASED		
Other		\$58,188
TOTALS	\$389,024	\$58,188

CLIENT DEMOGRAPHICS



<30 YRS
 51-70 YRS
 OVER 70 YRS
 INSTITUTIONAL
 31-50 YRS

REVENUE SOURCES



FEE-BASED
 SECURITIES-BASED