



LOCATION
Maryland

REVENUE
\$286,531.00

ASKING
\$710,000.00

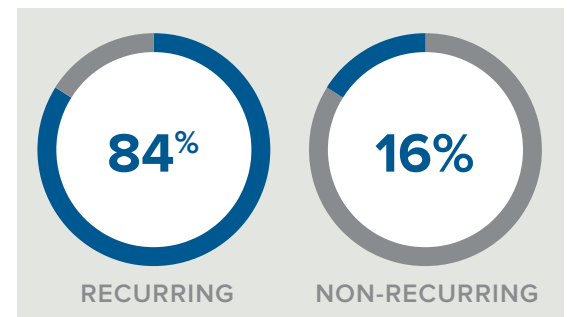
This RR/IAR practice, conveniently located in the Annapolis, Maryland region, has easy access to the surrounding Baltimore/Washington metropolitan areas and has roughly \$60 million in assets. It takes an individualized and high-touch approach to servicing their 133 client households. This practice generated over \$285,000 in revenue in 2021 managing 401k plans, consulting/estate planning, and commissions plus trails from annuities, mutual funds, stocks, and insurance.

The practice’s sole owner is looking for a glide path to retirement with a well-established firm that employs a consultative approach to client service and has previous acquisition experience. The seller would prefer a firm that has a local presence or has a demonstrated track record of being able to service clients remotely.

PRACTICE INFORMATION

Assets Under Advisory	\$60,015,400
Assets Under Management	\$29,405,480
Households	133
Form of Ownership	LLC
Total Number of Staff	2

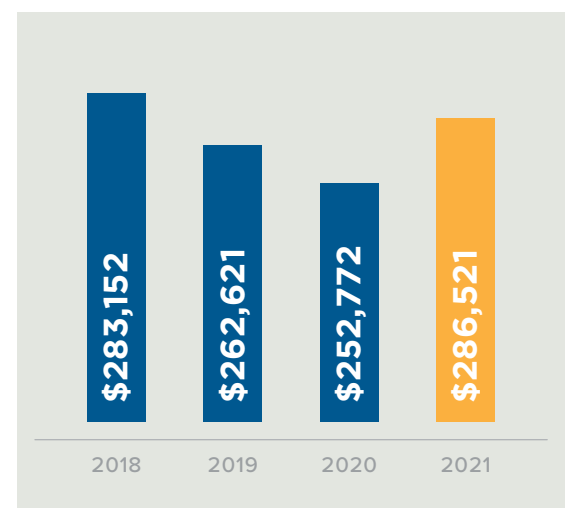
REVENUE



SELLER INFORMATION

Licenses	7, 63
Designations	ChFC, CLU, RICP, CASL
Education	Master’s Degree
Years in Industry	40
Insurance Lines Carried	Life, Health, Disability, LTC

HISTORICAL REVENUE



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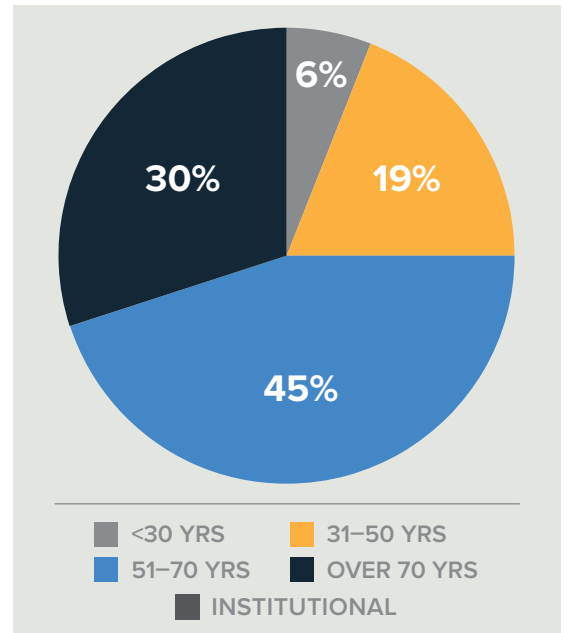
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SOURCES OF REVENUE

	RECURRING	NON-RECURRING
FEE-BASED		
401K	\$59,740	
SECURITIES-BASED		
Stocks		\$5,764
Mutual Funds	\$35,984	
Variable Annuities	\$52,424	
Other	\$2,862	
HOURLY-BASED		
Financial Planning		\$1,028
Consulting		\$1,131
Estate Planning		\$2,261
Other		\$566
INSURANCE-BASED		
Universal Life	\$2,201	
Disability	\$727	
LTC	\$6,431	\$23,641
Group Health	\$2,199	
Term Life		\$2,261
Group Term	\$10,880	
Whole Life	\$30,380	\$20,907
Fixed Annuities		\$4,389
Other	\$20,514	\$241
TOTALS		
	\$224,342	\$62,189

CLIENT DEMOGRAPHICS



REVENUE SOURCES

