



LOCATION
Pennsylvania

REVENUE
\$2,823,400.00

ASKING
\$6,700,000.00

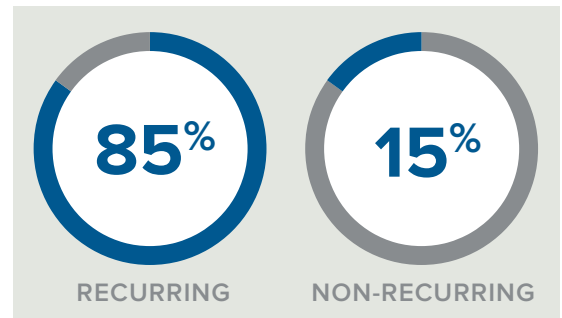
This RIA in the Pittsburgh area provides clients with comprehensive planning and wealth management services, including investment management, retirement and estate planning, business planning, tax planning, and preparation, among other offerings. This firm prides itself on its client responsiveness and providing its clients with open and honest advice and guidance. In 2021, this firm generated over \$2.8 million in gross revenues, with 83% of the revenue generated from managing \$340 million in assets and the remaining 17% from its other planning and wealth management services.

This is an excellent opportunity for a firm looking to establish a turn-key branch office in the Pittsburgh area. The ideal acquisition partner is a well-established firm with a robust planning and wealth management offering comparable to the offering currently being provided to this firm’s clients and a well-credentialed staff. This is a Sell and Stay opportunity with the firm’s staff and 3 principals looking for meaningful employment with the acquiring firm.

PRACTICE INFORMATION

Assets	\$389,000,000
Households	643
Form of Ownership	LLC
Total Number of Owners	3
Total Number of Employees	9

REVENUE

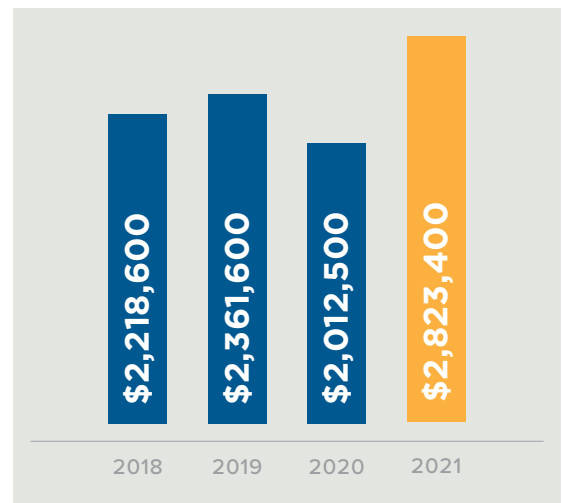


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HISTORICAL REVENUE





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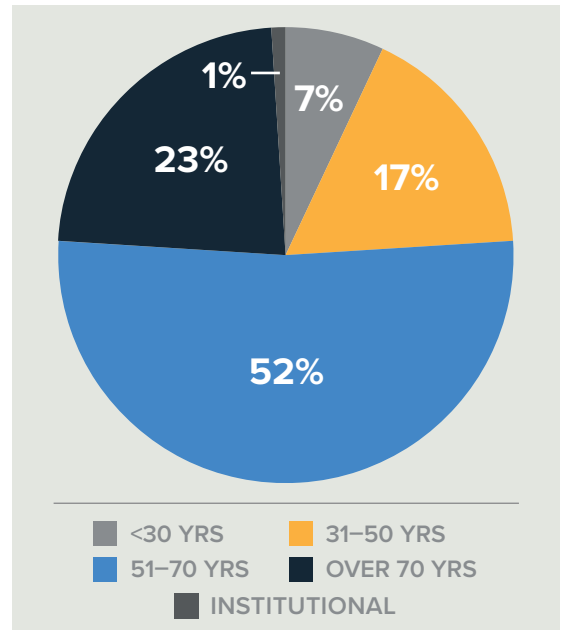
SELLER INFORMATION

Licenses	65
Designations	CFP
Years in Industry	43
Insurance Lines Carried	Life, Health, Disability, LTC, P&C

SOURCES OF REVENUE

	RECURRING	NON-RECURRING
FEE-BASED		
Fees from AUM	\$2,109,400	
3rd Party Managed Assets	\$200,000	
401K Plans	\$81,000	
HOURLY-BASED		
Taxes		\$4,000
INSURANCE-BASED		
Fixed Annuities		\$398,400
Long Term Care		\$24,000
Group Term		\$7,000
TOTALS		
	\$2,390,400	\$433,400

CLIENT DEMOGRAPHICS



REVENUE SOURCES

