



LOCATION

Central California

REVENUE

\$514,050.00

ASKING

\$1,400,000.00

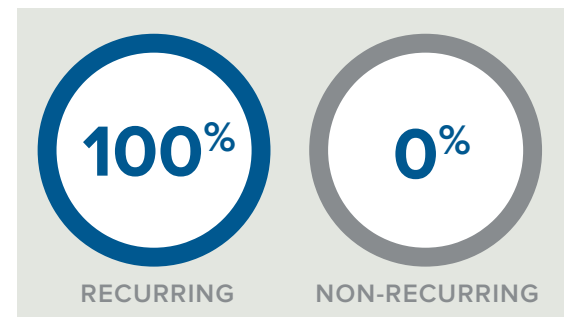
This IAR located in Central California provides investment management services to 121 client households mostly concentrated in the central valley. The seller has a more active investment style which is balanced against each client’s risk tolerance. This practice generated \$517,170 in gross revenue in 2021 from managing roughly \$45 million in assets.

An ideal acquisition partner for this practice would be an RIA or hybrid RIA that is interested in expanding its presence in California. The seller is looking for a short glide path to retirement and has a key employee currently serving in an administrative capacity that shows a lot of potential and is looking for meaningful employment post-transition.

PRACTICE INFORMATION

Assets	\$45,000,000
Households	121
Form of Ownership	Sole Prop.
Owner	1
Total Number of Employees	1

REVENUE

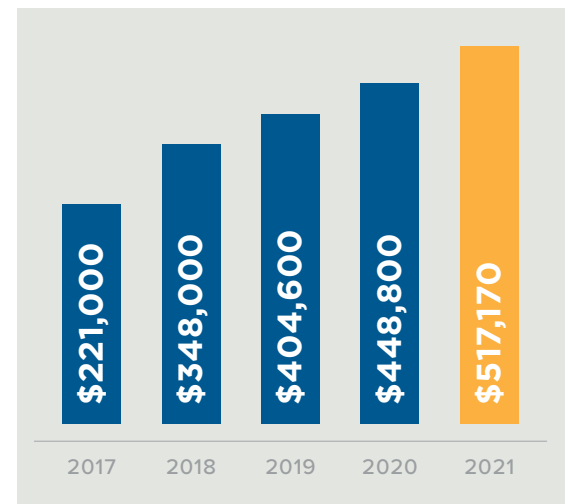


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HISTORICAL REVENUE





LOCATION
Central California

REVENUE
\$517,050.00

ASKING
\$1,400,000.00

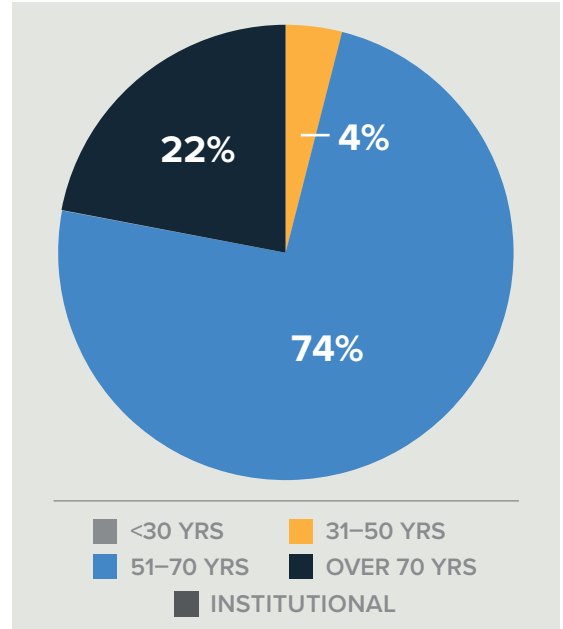
SELLER INFORMATION

Licenses	6, 66
Years in Industry	27
Insurance Lines Carried	Life, Health

SOURCES OF REVENUE

	RECURRING	NON-RECURRING
FEE-BASED		
Fees from AUM	\$258,000	
3rd Party Managed Assets	\$22,800	
401K Plans	\$86,250	
SECURITIES-BASED		
Variable Annuities	\$150,000	
TOTALS		
	\$517,050	

CLIENT DEMOGRAPHICS



REVENUE SOURCES

