LISTING 22-371

LOCATION	REVENUE	ASKING
North Dallas Metro	$370,000.00	$1,100,000.00

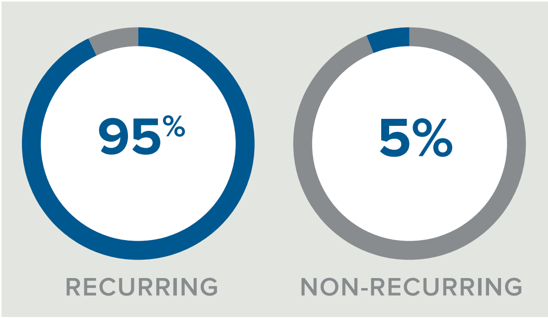
This RR/IAR located in the Dallas-Fort Worth metropolitan area offers comprehensive financial planning to his 79 client households. In 2021, this practice generated roughly $370,000 in revenue, approximately 93% of which was from managing roughly $42 million in assets with the remainder from commissions and trails from securities and insurance.

The ideal acquisition partner would be an RIA or hybrid RIA that offers a deeper bench and increased client service offerings that has a local presence or is at least willing to visit the area to meet with clients. The seller would prefer that their acquisition partner have at least one CFP on staff and use AssetMark and EMoney.

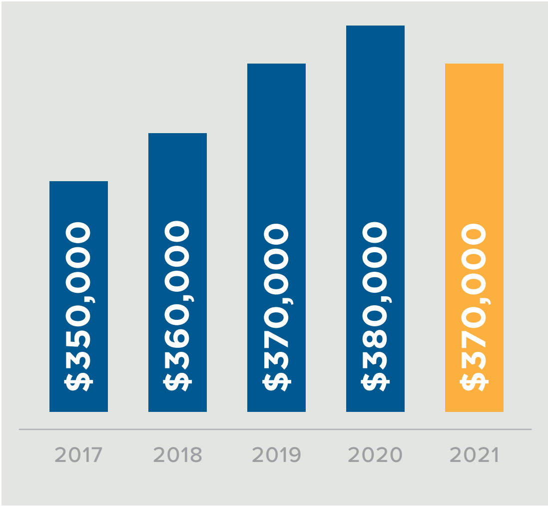
PRACTICE INFORMATION

Assets Under Management	$42,000,000
Households	79
Form of Ownership	S Corp.
Total Number of Employees	1
Billing Management Software	N/A

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

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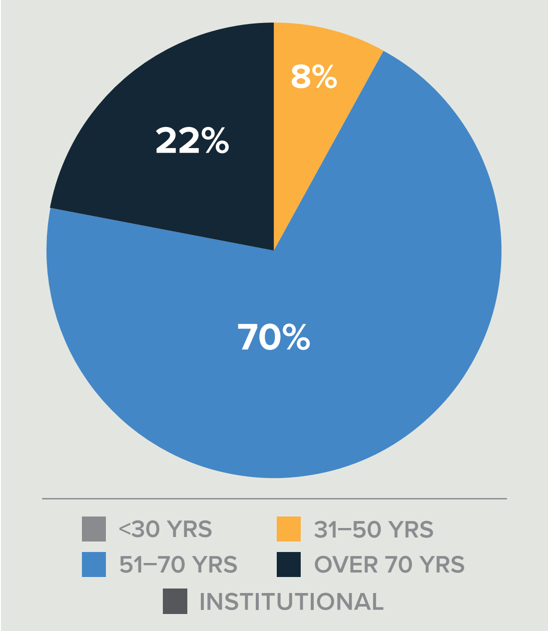
SELLER INFORMATION

Designations	CFP
Years in Industry	21

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE - BASED		
Fees from AUM	$343,000	
SECURITIES - BASED		
Other	$7,000	
INSURANCE - BASED		
Other		$20,000
TOTALS		
	$350,000	**$20,000**

CLIENT DEMOGRAPHICS



REVENUE SOURCES