FP TRANSITIONS®

LISTING 22-403

LOCATION	REVENUE	ASKING
Chicago	$819,000	$2,540,000

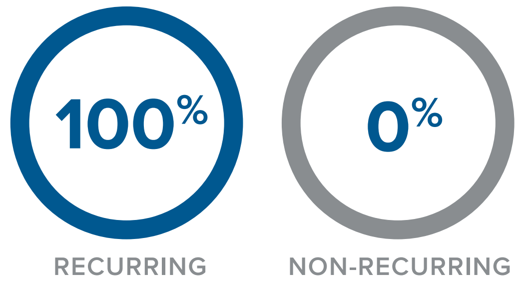
This Chicago-based fee-only RIA provides its clients with a full range of specialized services and a proactive, high-touch approach to the management of each client's total wealth. This RIA generated approximately $819,000 in revenue over the last 12 months from managing more than $111 million in assets under advisory for 74 client households.

An ideal acquisition partner for this practice would be a well-established and tech-savvy RIA with a deep bench that offers a holistic suite of services including comprehensive financial planning, tax planning and tax preparation. The sellers would prefer that their acquisition partner have, or be willing to establish, a local presence. This is a Sell and Stay® opportunity with one of the principals seeking a glide path to retirement and the practice's staff looking for meaningful employment with the partner firm post-sale.

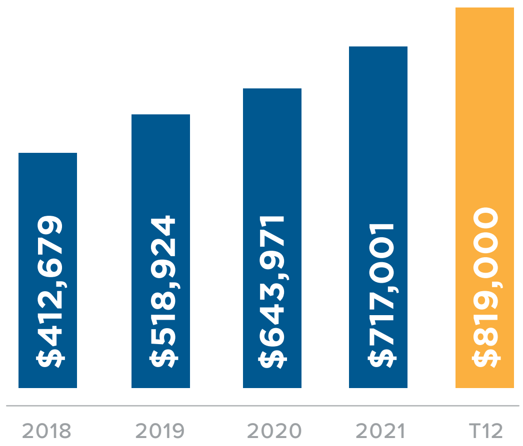
FIRM INFORMATION

Assets Under Advisory	$111,000,000
Households	74
Practice Type	RIA
Entity Structure	S Corp
Designations	CFP
Owners	2
Full-time Employees	1
Licensed Professionals	2

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit fptransitions.com/22-403-inquire or log in to your member portal to express your interest.

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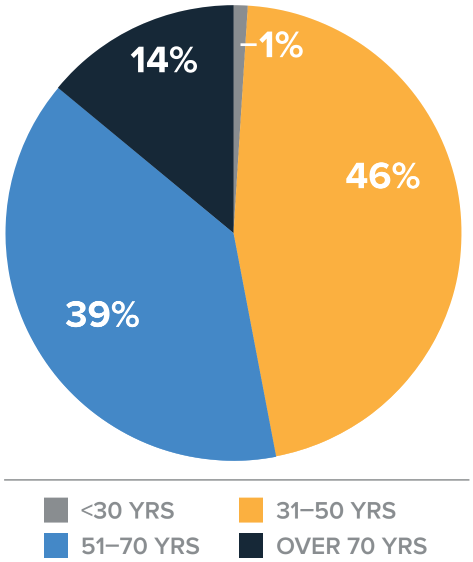
TECH STACK

CRM	Wealthbox

SOURCES OF REVENUE

	RECURRING	NON-RECURRING
FEE INCOME		
Fees from Advisory	$819,000	
TOTALS		
	$819,000	**$0**

CLIENT DEMOGRAPHICS



REVENUE SOURCES