



LOCATION
Northeast

REVENUE
\$2,438,000

This Northeast financial advisory and investment management firm is seeking a strategic merger partner. The cornerstone of this firm is its trusted team of young and energetic professionals that provide comprehensive planning and support to the firm’s approximately 250 clients, many of which are creatives, tech professionals, and business owners. This firm’s trailing 12-month gross revenues are around \$2.4 million, of which 98% is from managing approximately \$315 million in client assets.

The ideal merger partner would be a client-centric, planning-focused firm that has a hip culture and an ensemble approach to high-touch client service that can provide transformational change and a leap forward in scale. The partner firm should subscribe to a passive investment philosophy yet still have a strong investment management process. The principal of this firm is not looking for the firm to be acquired or rolled up into another organization but is looking for a partnership opportunity with a complimentary firm with the envisioned outcome being 1+1=3.

PRACTICE INFORMATION

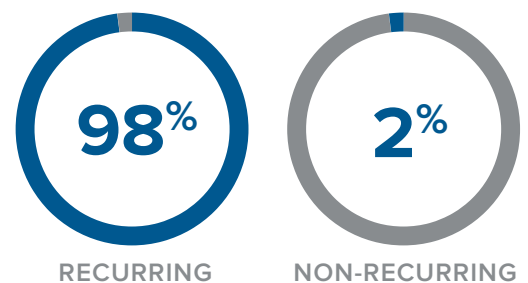
Entity Type	Hybrid
Assets	\$315,000,000

INQUIRE NOW

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REVENUE



HISTORICAL REVENUE

