FP TRANSITIONS®

LISTING 22-372

LOCATION	REVENUE	ASKING
Philadelphia Suburbs	$124,785.00	$400,000.00

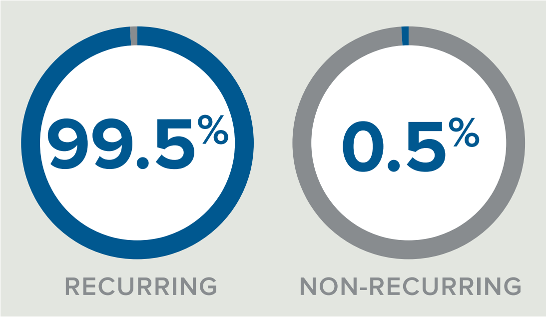
This fee-only RIA in the Philadelphia Suburbs offers investment advisory and financial, tax, and estate planning services to their 18 client households that are centrally located in the Northeast. This practice offers its services on an ongoing basis for a fee as well as on a one-time or retainer basis. In 2021, this practice generated $125,000 in gross revenues from managing roughly $17.5 million in assets on a non-discretionary basis.

The ideal acquisition partner for this practice would be an RIA with at least one CFP on staff and a passive investment style that utilizes indexed ETFs. The seller would prefer that their acquisition partner have a custodial relationship with Fidelity and have an office in the Philadelphia area or be willing to visit with clients in person as needed.

PRACTICE INFORMATION

Assets Under Management	$17,500,000
Households	18
Form of Ownership	Sole Prop.
Number of Owners	1

REVENUE



INQUIRE NOW

Visit **fptransitions.com/22-372inquire** or log in to your member dashboard to inquire.

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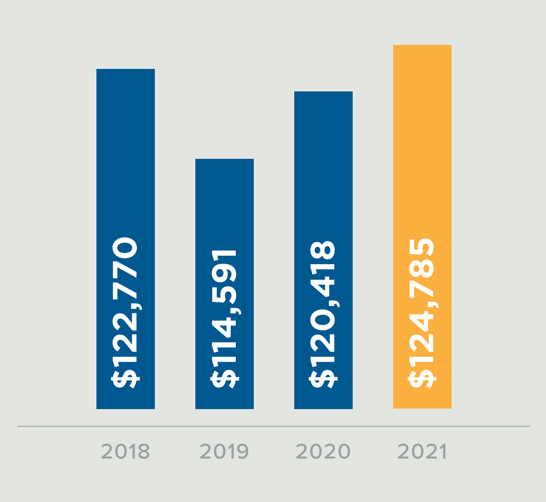
HISTORICAL REVENUE



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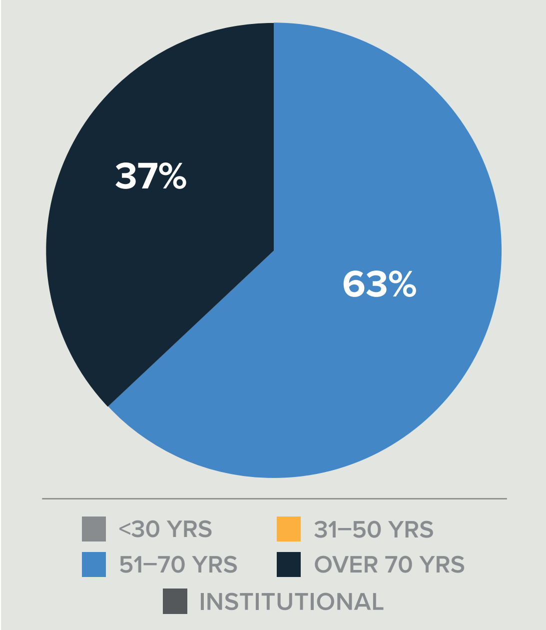
SELLER INFORMATION

Designations	CFP, ChFC, CLU
Years in Industry	47

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$124,285	
HOURLY-BASED		
Financial Planning		$500
TOTALS		
	$124,285	**$500**

CLIENT DEMOGRAPHICS



REVENUE SOURCES