FP TRANSITIONS®

LISTING 22-373

LOCATION	REVENUE	ASKING
Washington	$249,919.00	$750,000.00

This fee-only RIA in the Pacific Northwest is focused on providing its 51 households with exceptional financial planning and wealth management services with a focus on sustainable, socially responsible and impact investing. Total revenue for this RIA in 2021 was $242,427, with approximately 93 percent from managing $24,000,000 million in assets and the remaining from financial planning fees.

The ideal acquisition partner would be a fee-only RIA with at least one CFP on staff that views the world through a socially responsible lens. The seller would like to help an acquiring firm successfully transition clients during a one-year glide path to retirement.

PRACTICE INFORMATION

Assets Under Advisory	$24,919,209
Households	51
Owners	4
Employees	1

TECH STACK

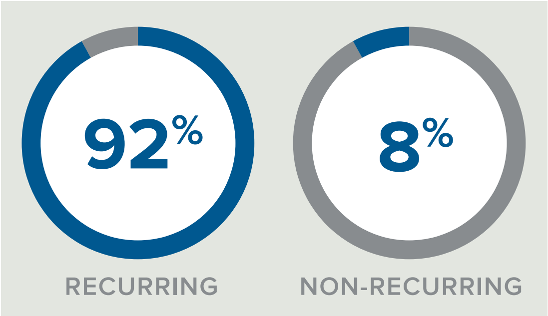
Portfolio Management System	Panoramix
Customer Relationship Management System	Wealthbox

INQUIRE NOW

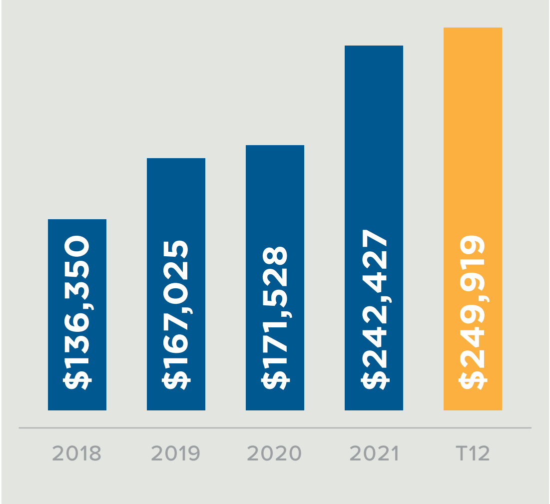
Visit **fptransitions.com/22-373-inquire** or log in to your member dashboard to inquire.

Not a member? Create your free membership at **fptransitions.com/membership**.

REVENUE



HISTORICAL REVENUE



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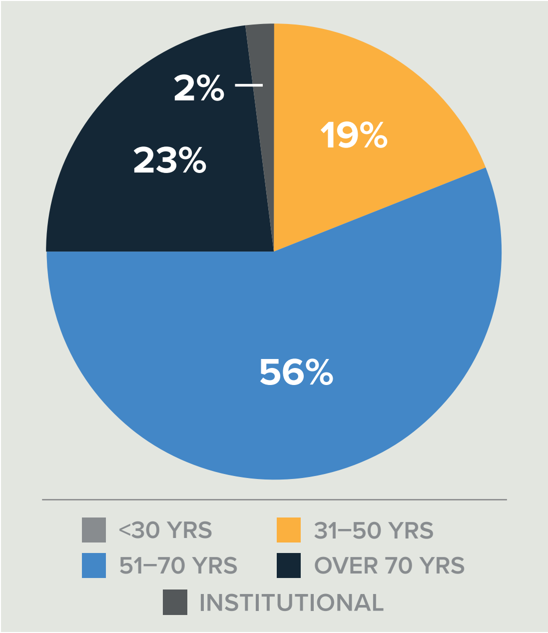
SELLER INFORMATION

Licenses	7, 66
Designations	CFP
Years in Industry	17

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$224,594	
401K Plans	$2,498	
HOURLY-BASED		
Financial Planning	$4,050	$18,777
TOTALS		
	$231,142	**$18,777**

CLIENT DEMOGRAPHICS



REVENUE SOURCES