

**LOCATION**
Northeast**REVENUE**
\$670,000

This is a unique partnership opportunity with an investment management focused RIA. While this RIA does manage approximately \$50 million in AUM for individual clients, the practice combines this with a separate subscription-based business providing web-based investment research using quantitative, factor-based strategies to help industry professionals and individual investors analyze individual securities and generate investment ideas. In terms of revenue, this practice generated approximately \$670,000 in 2021, 38% from subscription content and licensing fees, with the remaining from managing AUM.

The ideal partner for this practice is a firm that understands the business that has been created and would like to work together with the principals of the firm to utilize its model development capabilities and its wide reach to grow the combined entity. This is a Sell and Stay opportunity as the principals of this practice are driven and would like to partner with a firm that shares their vision and can help drive value from the firm's proprietary technology and investing models, external partnerships and article/podcast-based content distribution network.

The firm runs 40+ quantitative active equity models based on published investment writings, books and academic studies and a series of systematic ETF strategies. The model line-up, investing offerings and content strategy developed by the firm could result in the following benefits to an acquirer:

1. Lower investment related expenses currently being paid to third party managers and strategists;
2. Differentiation of the acquirer by being able to offer long-only and risk managed systematic models to its existing client base while also acting as a key, differentiated offering on winning new clients and business;
3. Penetration as model provider on TAMP platforms and sub-advisory opportunities;
4. Brand building through a cohesive content strategy that includes podcasting, blogging, investor presentations and social media.

PRACTICE INFORMATION

Assets Under Management	\$50,000,000
Form of Ownership	LLC
Total Number of Employees	3

INQUIRE NOW

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REVENUE