FP TRANSITIONS®

LISTING 22-377

LOCATION	REVENUE	ASKING
Pittsburgh Metro	$462,973.00	$1,450,000.00

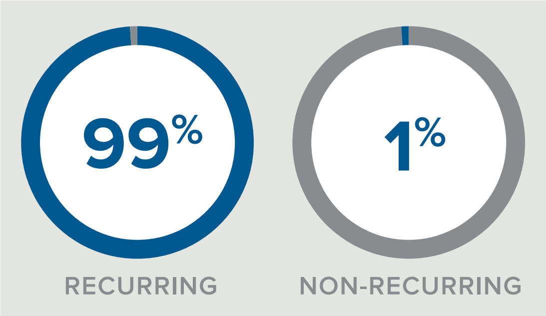
This fee-only RIA based in the Pittsburgh metropolitan area provides integrated comprehensive financial planning and investment management to their long-tenured, stable 39 client households. This practice also provides clients with tax advice and tax preparation services. This practice's trailing 12-month revenue is $463,000 from managing roughly $60 million in assets.

The ideal acquisition partner for this practice would be an RIA or hybrid with a synergistic client service offering. There is a well-qualified CFP employee that would like to be retained post-sale. The seller would prefer that their acquisition partner have or be willing to establish a local office.

PRACTICE INFORMATION

Assets	$60,000,000
Households	39
Form of Ownership	LLC
Total Number of Owners	1
Total Number of Staff	1

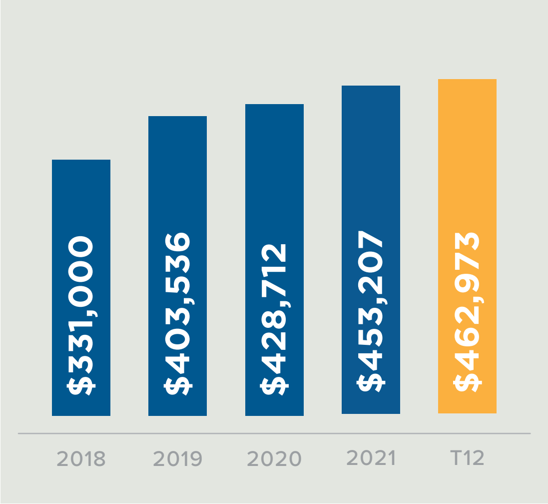
REVENUE



TECH STACK

Financial Planning	MoneyGuide Pro
CRM	Redtail
Portfolio Management	Morningstar Advisor Workstation

HISTORICAL REVENUE



INQUIRE NOW

Visit fptransitions.com/22-377-inquire or log in to your member dashboard to inquire.

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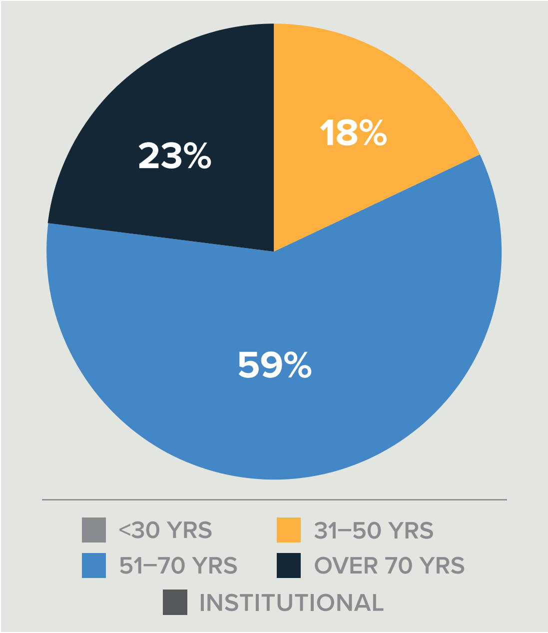
SELLER INFORMATION

Licenses	65
Designations	CFP
Years in Industry	24

SOURCES OF REVENUE

	RECURRING	NON-RECURRING
FEE-BASED		
Fees from AUM	$459,648	
HOURLY-BASED		
Financial Planning		$3,325
TOTALS		
	$459,648	**$3,325**

CLIENT DEMOGRAPHICS



REVENUE SOURCES