FP TRANSITIONS®

# LISTING 22-378

| LOCATION | REVENUE | AUM |
|---|---|---|
| Ohio | $2,294,805 | $340,000,000 |

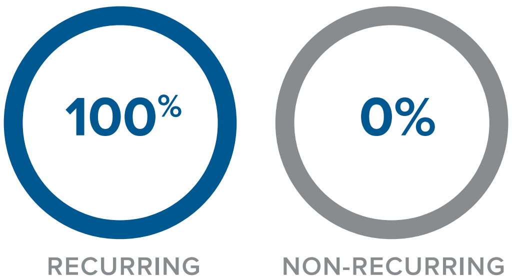
This fee-only RIA is focused on holistic goal centric financial planning and investment management for its 209 client households. This RIA values a team approach and a culture of collaboration and inclusivity over competition. With projected 2022 revenues of $2.5 million from managing over $340 million in assets, this RIA would make a great addition to a firm seeking to establish or expand in the Midwest.

The ideal acquisition partner for this RIA would be a mid-sized planning-focused fee-only RIA with a sophisticated tech stack that understands the importance of process development to create efficiencies and a consistent client experience. This is a Sell and Stay® opportunity with the RIA's principals and staff seeking meaningful employment post-sale.

## FIRM INFORMATION

| | |
|---|---|
| Est. 2022 Gross Revenue | $2,500,000 |
| Est. Non-Recasted EBITDA | $592,610 |
| Owners | 6 |
| Full Time Employees | 4.5 |
| Designations | CFP |

## REVENUE

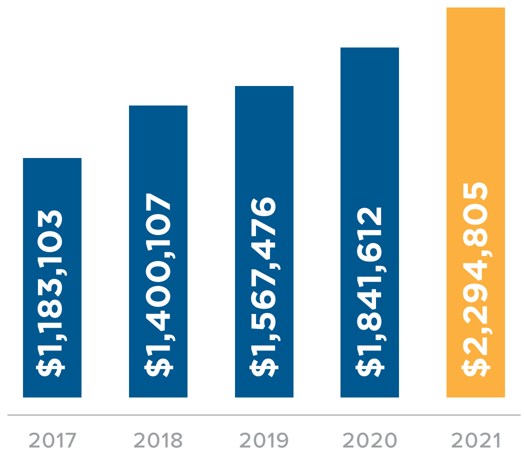



## INQUIRE NOW

Visit **fptransitions.com/22-378-inquire** or log in to your member portal to express your interest.

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

## HISTORICAL REVENUE



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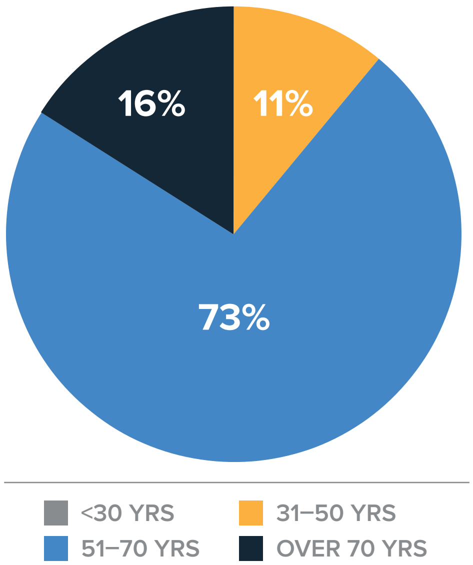
## TECH STACK

| | |
|---|---|
| Portfolio Analysis Software | Morningstar Office |
| Portfolio Reporting Software | Tamarac |
| Financial Planning Software | MoneyGuide Pro |
| CRM | Redtail Technology |

## SOURCES OF REVENUE

| | RECURRING | NON-RECURRING |
|---|---|---|
| **FEE-BASED** | | |
| Fees from AUM | $2,294,805 | |
| **TOTALS** | | |
| | **$2,294,805** | |

## CLIENT DEMOGRAPHICS




## REVENUE SOURCES