FP TRANSITIONS®

LISTING 22-385

LOCATION	REVENUE	ASKING
Georgia	$2,900,000	Negotiable

This Georgia based fee-only RIA provides comprehensive, cash flow based financial planning, investment management, tax, and estate services to 368 client households that are primarily located in the Southeast. With 2021 revenues of roughly $2.9 million from managing nearly $350 million in assets, this RIA would make a great addition to a larger RIA seeking to establish or expand its roots in Georgia.

The ideal partner for this RIA would be a well-established fee-only firm with a client first mentality that offers complimentary client services. This is a Sell and Stay® opportunity so potential partner firms should be prepared to offer meaningful employment opportunities to the RIA's principals and staff post-sale.

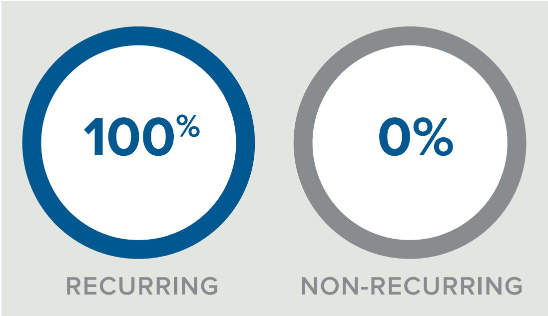
FIRM INFORMATION

Assets Under Managment	$350,000,000
Households	368

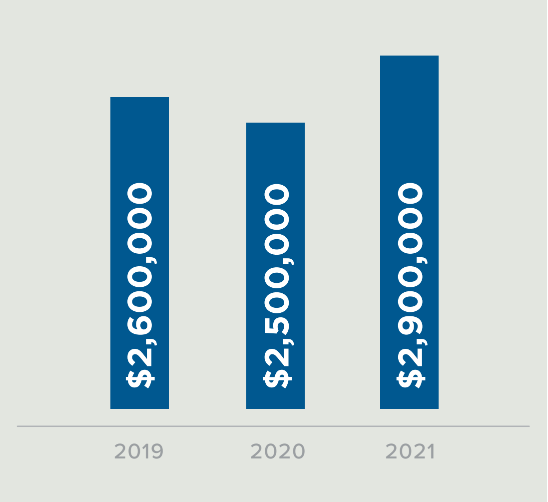
STAFF INFORMATION

Owners	4
Full Time Employees	5
Designations	CPA, CFP

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit fptransitions.com/22-385-inquire or log in to your member portal to express your interest.

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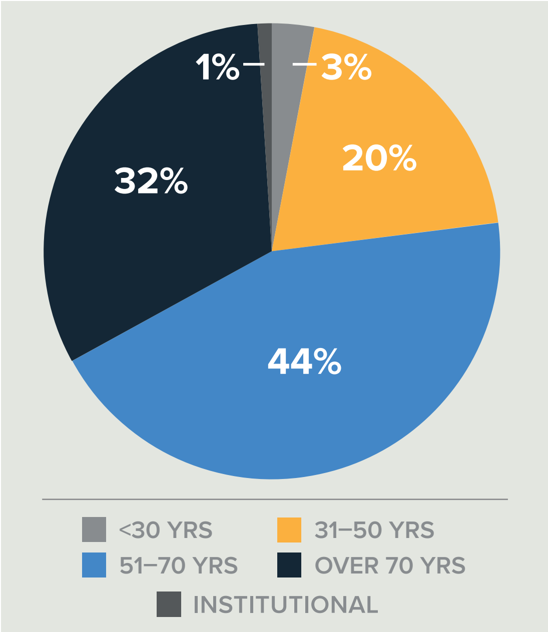
TECH STACK

Portfolio Analysis	Tamarac
Portfolio Reporting	Portfolio Center
Financial Planning Software	eMoney
CRM	Junxure

SOURCES OF REVENUE

	RECURRING	NON-RECURRING
FEE-ONLY		
Fees from AUM	$2,900,000	
TOTALS		
	$2,900,000	

CLIENT DEMOGRAPHICS



REVENUE SOURCES