



LOCATION
Minnesota

REVENUE
\$2,436,946

ASKING
Negotiable

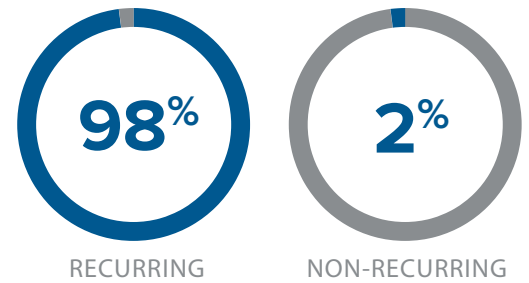
This well-established fee-only RIA is based in the suburbs of Minneapolis, Minnesota. This well-credential team, services roughly 311 client households, generating approximately \$2.45 million in trailing 12-months revenue from managing approximately \$313 million in client assets.

The ideal acquisition partner for this RIA is a fee-only, planning first RIA that also offers in-house tax preparation and planning. The founding partner of this RIA is looking to retire whereas this RIA's junior partner and staff are seeking meaningful employment with the acquiring firm post-sale.

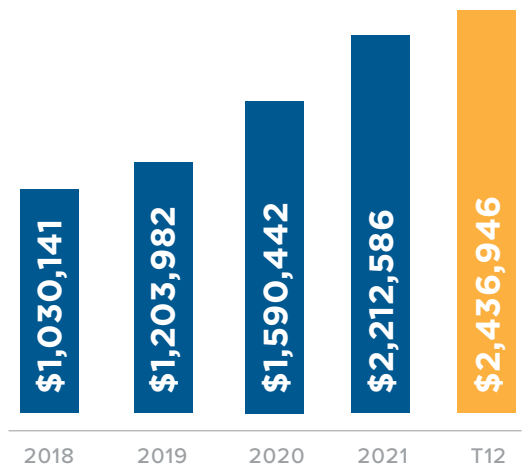
FIRM INFORMATION

Assets Under Management	\$312,887,804
Households	311
Form of Ownership	LLC
Owners	3
Full Time Employees	4
Designations	CFA, CFP, CPA, EA

REVENUE



HISTORICAL REVENUE



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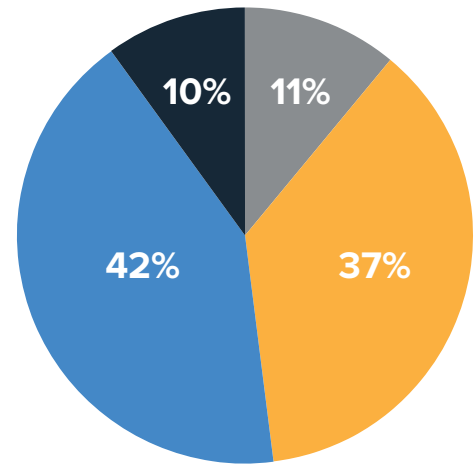
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TECH STACK

CRM	Redtail
Financial Planning Software	MoneyGuide Pro
Billing Management Software	Portfolio Center
Trading Software	TRX
Tax Planning Software	BNA

CLIENT DEMOGRAPHICS

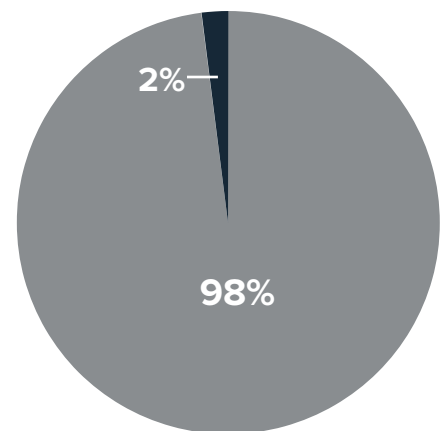


■ <30 YRS ■ 31-50 YRS
■ 51-70 YRS ■ OVER 70 YRS

SOURCES OF REVENUE

	RECURRING	NON-RECURRING
FEE INCOME		
Fees from AUM	\$2,260,010	
401K Plans	\$131,936	
HOURLY/FIXED FEE INCOME		
Financial Planning		\$45,000
TOTALS		
	\$2,391,946	\$45,000

REVENUE SOURCES



■ FEE INCOME
■ HOURLY/FIXED FEE INCOME