



LOCATION
NYC Metro

REVENUE
\$1,877,894

ASKING
\$6,700,000

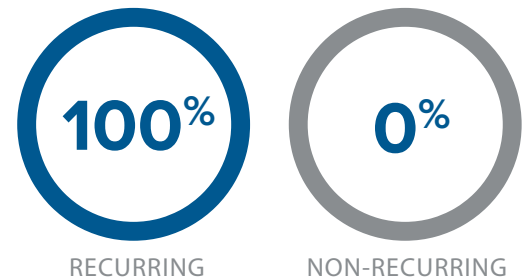
Located in the New York City metro area, this IAR/RR practice is focused on providing client-centric, values-based financial planning and wealth management services. Using a comprehensive approach to wealth management, this practice strives to bring clarity and confidence in financial decision-making to each of its 239 client households. In 2021, this practice generated nearly \$1.88 million in revenue from managing roughly \$200 million in assets.

The ideal acquisition partner for this practice would be a well-established firm that has a client-first/centric mentality, defined operational processes, and a presence in the New York City area. The acquisition partner must also be willing to provide the practice’s principal a glide path to retirement and provide meaningful employment for the practice’s well-credentialed staff post-sale.

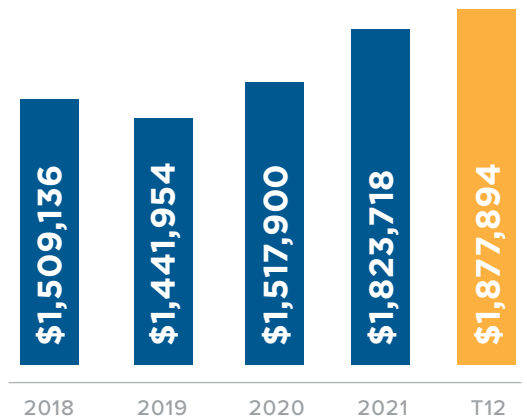
FIRM INFORMATION

Assets Under Management	\$200,000,000
Households	239
Form of Ownership	S Corp.
Owners	1
Full Time Employees	3
Designations	CFP, ChFC

REVENUE



HISTORICAL REVENUE



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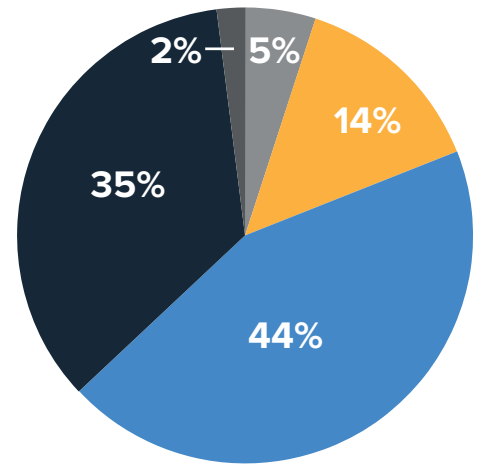
TECH STACK

CRM	Junxure
Billing Management Software	Orion
Portfolio Management System	Orion

SOURCES OF REVENUE

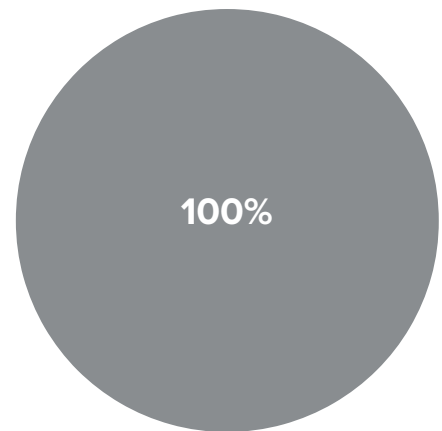
	RECURRING	NON-RECURRING
FEE INCOME		
Fees from AUM	\$1,877,894	
TOTALS		
	\$1,877,894	

CLIENT DEMOGRAPHICS



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

REVENUE SOURCES



- FEE INCOME