FP TRANSITIONS®

# LISTING 22-394

| LOCATION | REVENUE | ASKING |
|---|---|---|
| Northeast | $415,000 | $1,200,000 |

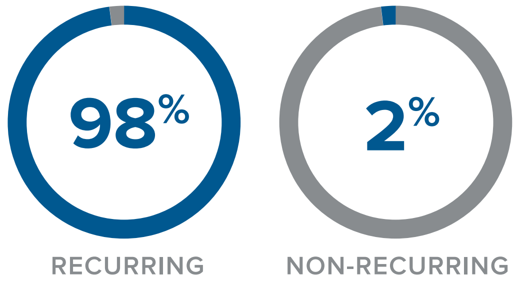
This fee-only RIA in the Northeast offers personalized financial planning and investment management services to individuals and small businesses. The practice's 40 client households are primarily located on the eastern seaboard. Over the last 12 months, this practice generated nearly $415,000 in gross revenues from managing $70 million in assets.

The ideal acquisition partner for this practice would be an established, planning-focused fee-only firm that has at least one CFP on staff.

## FIRM INFORMATION

| | |
|---|---|
| Assets Under Managment | $70,000,000 |
| Households | 40 |
| Form of Ownership | LLC |
| Owners | 1 |
| Full Time Employees | 1 |
| Designations | CFP |

## REVENUE

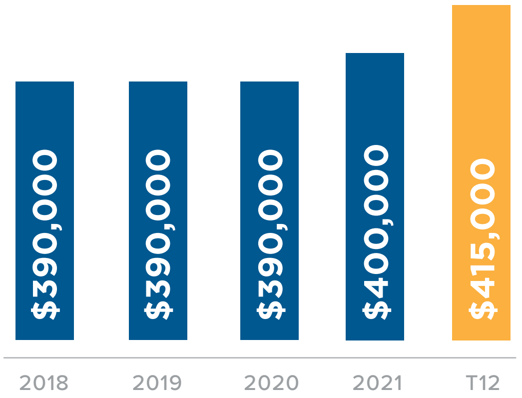



## INQUIRE NOW

Visit fptransitions.com/22-394-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



FP TRANSITIONS®

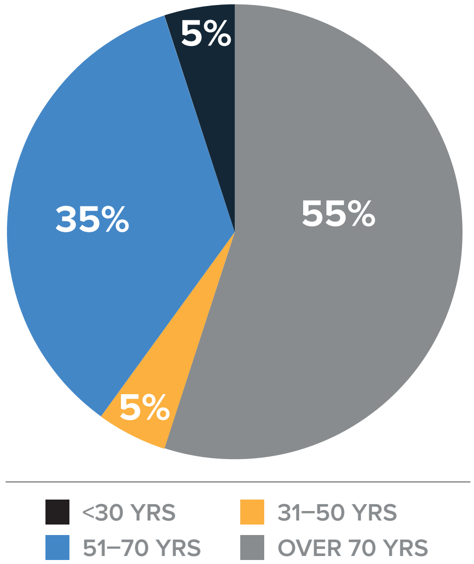
# LISTING 22-394

| LOCATION | REVENUE | ASKING |
|---|---|---|
| Northeast | $415,000 | $1,200,000 |

## SOURCES OF REVENUE

| | RECURRING | NON-RECURRING |
|---|---|---|
| **FEE INCOME** | | |
| Fees from Advisory | $405,000 | |
| **HOURLY/FIXED FEE INCOME** | | |
| Financial Planning | | $10,000 |
| **TOTALS** | | |
| | **$405,000** | **$10,000** |

## CLIENT DEMOGRAPHICS




## REVENUE SOURCES