FP TRANSITIONS®

LISTING 22-395

LOCATION
Washington D.C. Suburbs

REVENUE
$1,358,823

ASKING
$ 3,750,000

This Washington D.C. Suburbs based RR/IAR practice is a deep relationship, high touch firm focused on comprehensive financial and life planning for their 362 client households. The practice generated over $1,300,000 in trailing 12-month revenue, 86% of that revenue comes from managing over $103 million in AUM, 12% mostly from mutual funds and variable annuities, 1% from life insurance, and 1% from hourly financial planning.

The ideal acquisition partner for this practice is a firm that leads with financial planning and has a proven track record of providing clients with tailored wealth management solutions. The principal of this practice is looking to help an acquiring firm successfully transition clients over an agreed upon time period before moving into retirement. This practice has three full time employees that would like meaningful employment with the acquiring firm post sale.

FIRM INFORMATION

Assets Under Advisory	$103,887,470
Assets Under Managment	$130,627,000
Households	362
Full-time Employees	3
Owners	1

TECH STACK

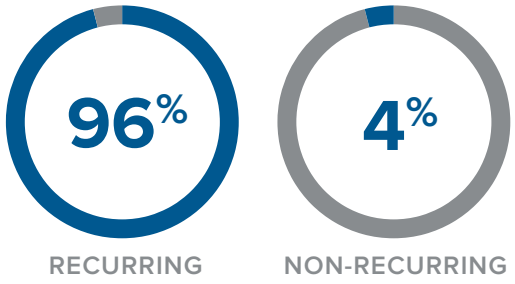
Financial Planning Software	Right Capital

INQUIRE NOW

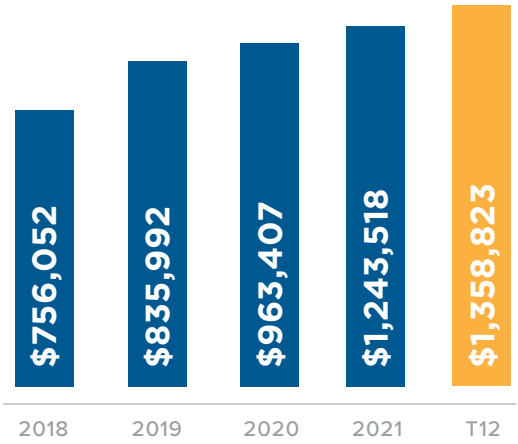
Visit **fptransitions.com/22-395-inquire** or log in to your member portal to express your interest.

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

REVENUE



HISTORICAL REVENUE



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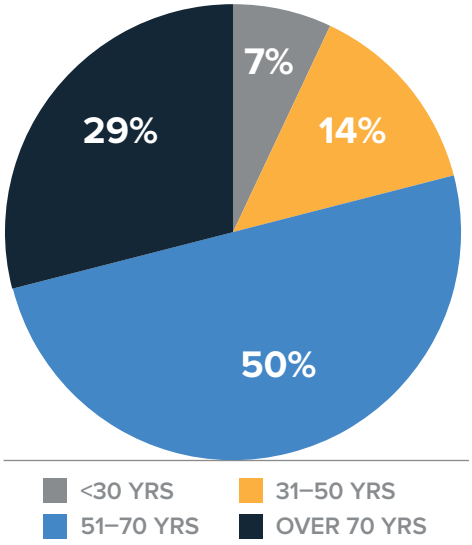
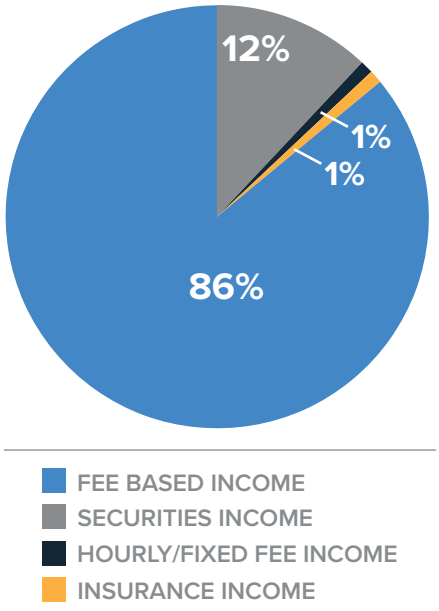
SOURCES OF REVENUE

	RECURRING	NON-RECURRING
FEE INCOME		
Fees from AUM	$1,165,625	
SECURITIES INCOME		
Mutual Funds	$10,705	$22,514
Variable Annuities	$105,779	$16,959
Other	$11,301	
HOURLY/FIXED FEE INCOME		
Financial Planning	12,775	
INSURANCE INCOME		
Term Life		$11,484
Whole Life	$954	$128
Other	$599	
TOTALS		
	$1,307,738	**$51,085**

CLIENT DEMOGRAPHICS



REVENUE SOURCES



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