FP TRANSITIONS®

LISTING 22-396

LOCATION	REVENUE	ASKING
New England	$500,000	$1,525,000

This RIA based in New England offers financial planning and investment advisory services to its 51 client households. Year to date through June 30, 2022, this practice generated roughly $266,000 in gross revenues from managing approximately $66M in assets.

The ideal acquisition partner for this RIA would be a well-established firm with an existing presence in the New England area that is a true fiduciary to its clients and has CFP professionals on staff. The principal of this RIA is looking for a glide path post-transition.

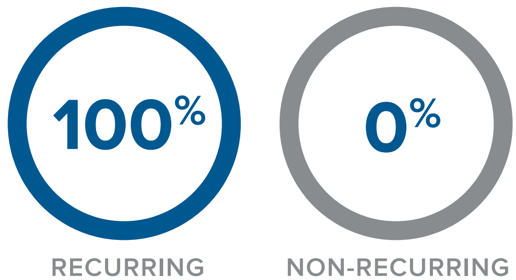
FIRM INFORMATION

Assets Under Managment	$65,900,000
Households	51
Form of Ownership	LLC

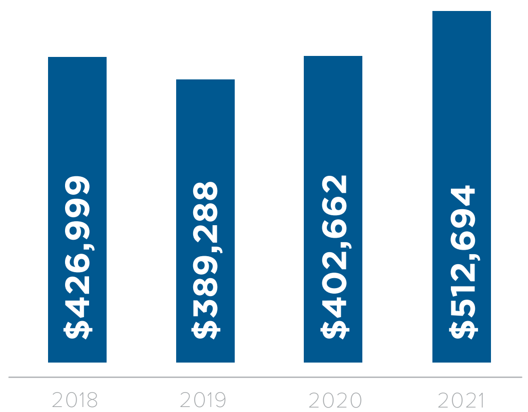
STAFF INFORMATION

Designations	CFP
Owners	1
Years in Industry	19

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit **fptransitions.com/22-396-inquire** or log in to your member portal to express your interest.

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New England	$500,000	$1,525,000

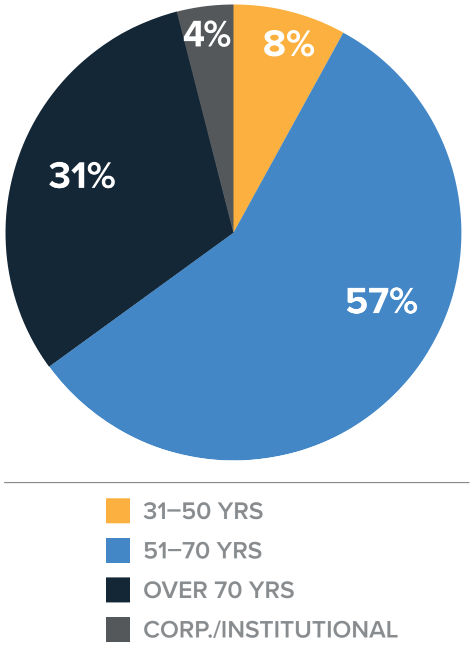
TECH STACK

CRM	Redtail
Portfolio Management	BD/Custodial Platform
Financial Planning	MoneyGuide Pro

SOURCES OF REVENUE

	RECURRING	NON-RECURRING
FEE INCOME		
Fees from Advisory	$500,000	
TOTALS		
	$500,000	

CLIENT DEMOGRAPHICS



REVENUE SOURCES