FP TRANSITIONS®

LISTING 22-401

LOCATION	REVENUE	ASKING
Southern Oregon	$465,000	$1,500,000

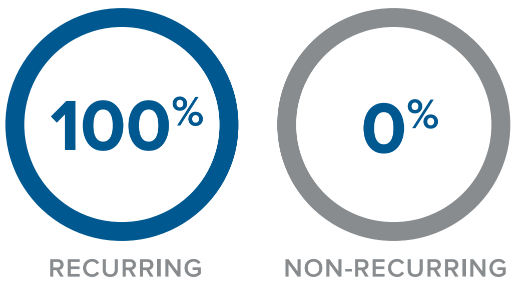
This Southern Oregon RIA provides its 73 client households investment management and financial planning services with experience in ESG investments and retirement planning. Over the last 12 months, this practice has generated $465,000.00 in recurring revenue from managing roughly $56 million in assets.

The ideal acquisition partner for this practice is a planning-focused, fee-only firm with an emphasis on ESG investments and has at least one CFP on staff. The principal of this practice is looking to retire after the clients have been transitioned successfully to an acquiring firm. The practice has one experienced support staff member who is looking for meaningful employment with the acquiring firm post-sale. A firm with a presence in Southern Oregon is strongly preferred.

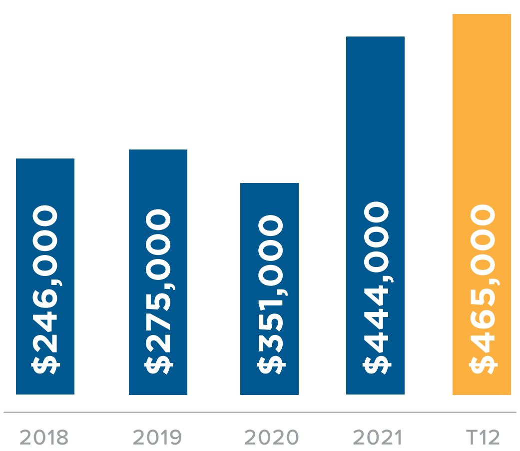
FIRM INFORMATION

Assets Under Managment	$56,800,000
Households	73
Practice Type	RIA
Entity Structure	LLC
Owners	1
Full-time Employees	3
Licensed Professionals	1

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

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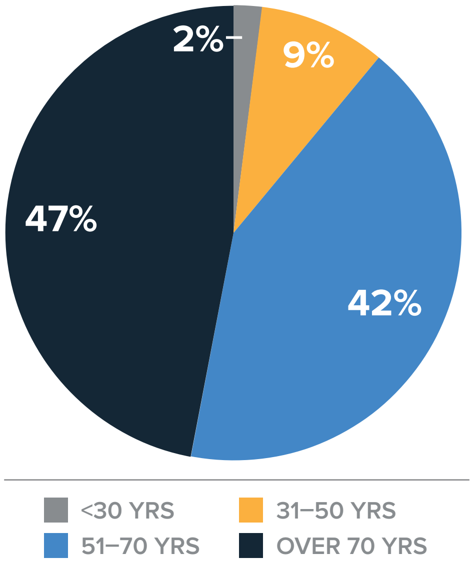
TECH STACK

Portfolio Management	Orion Advisor Desktop

SOURCES OF REVENUE

	RECURRING	NON-RECURRING
FEE INCOME		
Fees from Advisory	$465,000	
TOTALS		
	$465,000	**$0**

CLIENT DEMOGRAPHICS



REVENUE SOURCES