FP TRANSITIONS

LISTING 22-405

LOCATION	REVENUE	ASKING
Boston Suburbs	$679,815	$2,000,000

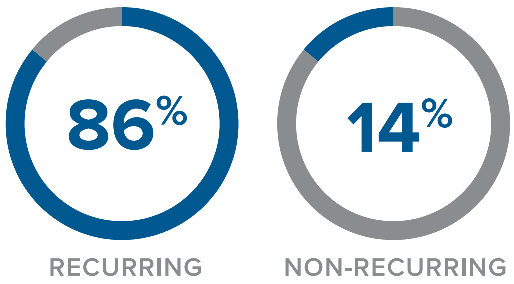
This fee-only RIA in the Boston suburbs provides its 50 households with exceptional comprehensive financial planning and investment management services. Trailing 12-month revenue for this RIA is nearly $680,000, comprised of over $500,000 from managing over $43,000,000 in assets, with the remaining $180,000 from financial planning fees. The majority of this RIA's clients are in New England, with a small percentage of clients residing in other regions.

The ideal acquisition partner for this RIA is a planning centric, fee-only RIA with a New England presence that has an established track record of providing clients with bespoke planning and integrated wealth management. The founder of this RIA will assist in successfully transitioning clients and is open to staying on in a variety of capacities with an acquiring firm. There are currently four full time employees that would like to have meaningful employment post transaction.

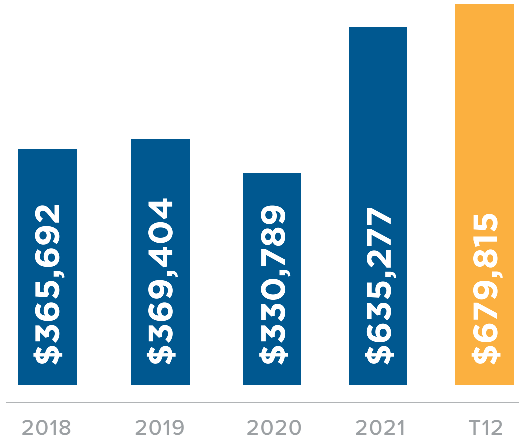
FIRM INFORMATION

Assets Under Managment	$43,000,000
Households	50
Practice Type	RIA
Entity Structure	LLC
Owners	1
Full-time Employees	4
Licensed Professionals	2
Licenses	66
Designations	CFP, MBA

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit fptransitions.com/22-405-inquire or log in to your member portal to express your interest.

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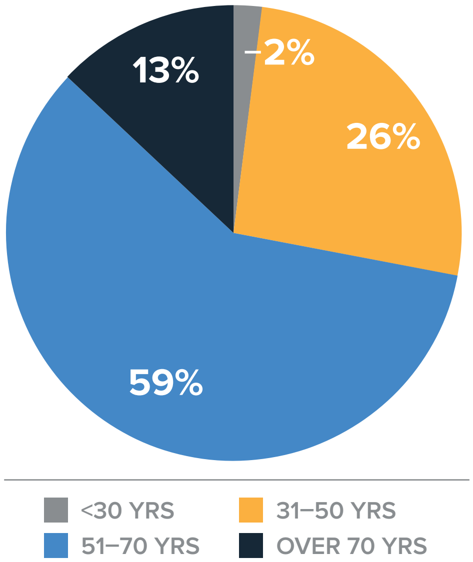
TECH STACK

Financial Planning	MoneyGuide Pro
Portfolio Management	Orion Advisor
CRM	Redtail

SOURCES OF REVENUE

	RECURRING	NON-RECURRING
FEE INCOME		
Fees from Advisory	$507,365	
HOURLY INCOME		
Financial Planning	$77,855	$94,595
TOTALS		
	$585,220	**$94,595**

CLIENT DEMOGRAPHICS



REVENUE SOURCES