FP TRANSITIONS

LISTING 22-407

LOCATION	REVENUE	ASKING
Michigan	$1,249,235	$3,750,000

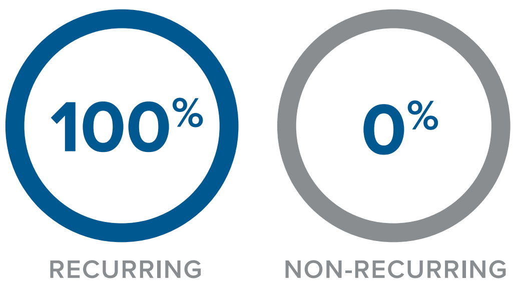
This fee-only RIA based in Michigan is focused on providing a comprehensive suite of wealth management services to its client base, including many entrepreneurs and business owners, while also partnering with corporations and their employees to provide retirement guidance and support. This RIA services over 150 households and derives over 75% of its revenue from recurring advisory fees, with the remaining 25% coming from recurring 401(k) advisory fees. 2021 Revenue for this RIA came in at nearly $1,250,000, 100% of which coming from recurring revenue sources.

This is a true Sell and Stay® opportunity, with the principal looking to find an ongoing partnership with a well-established partner firm. The RIA's team is comprised of six full-time members, all of which will look to maintain meaningful employment post transaction.

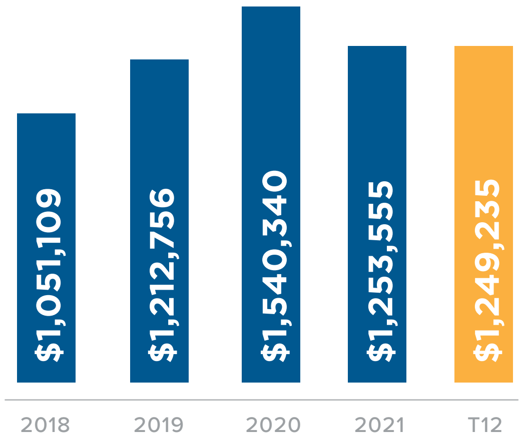
FIRM INFORMATION

Assets	$210,900,000
Households	157
Practice Type	RIA
Entity Structure	LLC
Owners	1
Full-time Employees	6
Licensed Professionals	3
Designations	CFP, AIF

REVENUE



HISTORICAL REVENUE



INQUIRE NOW

Visit **fptransitions.com/22-407-inquire** or log in to your member portal to express your interest.

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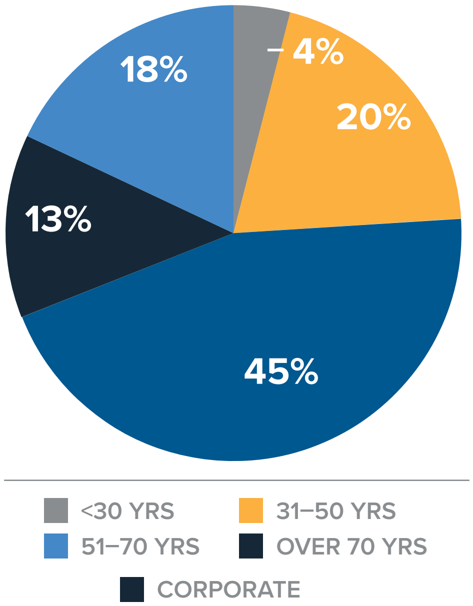
TECH STACK

Portfolio Management	Envestnet/Tamarac
CRM	XLR8/Salesforce
Financial Planning	MoneyGuide Pro

SOURCES OF REVENUE

	RECURRING	NON-RECURRING
FEE INCOME		
Fees from Advisory	$970,940	
401(k)	$278,295	
TOTALS		
	$1,249,235	

CLIENT DEMOGRAPHICS



REVENUE SOURCES