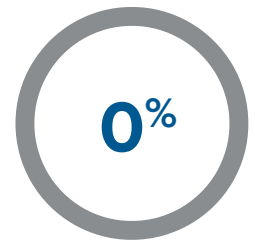| LOCATION	REVENUE	ASKING
Tampa Bay, Florida	$2,654,335	Negotiable

This RIA/RR practice in the Tampa Bay area is focused on providing its 476 client households, many of which are multi-generational, with comprehensive goal-based planning, investment management, insurance, tax, and estate planning services. This firm generated approximately $2.65 million in recurring trailing 12-month gross revenues. 74% of the revenue was from managing roughly $205 million in assets with the remaining 26% generated from trails from mutual funds, variable annuities, and insurance sales.

The ideal acquisition partner for this firm would be a well-established, professional firm that offers a similar client experience and is willing to maintain the current office space. This firm has 5 experienced staff members, including two CFPs and a CFA, who are seeking meaningful employment with the acquisition partner firm. With its turn-key infrastructure, available office space, and well-qualified staff, this is an excellent opportunity for a firm seeking to establish a branch office in the Tampa Bay area.
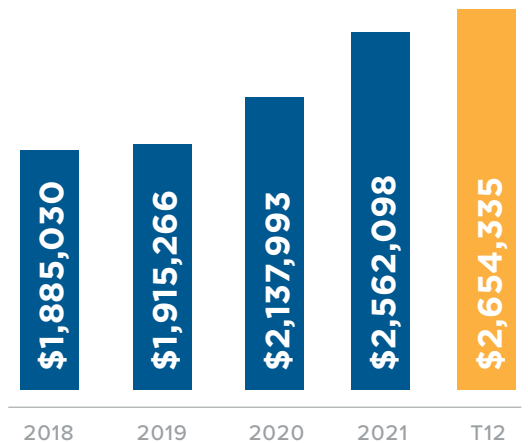
FIRM INFORMATION

Assets	$287,143,000
Households	476
Practice Type	Hybrid
Entity Structure	S Corp.
Owners	1
Full-time Employees	6
Licensed Professionals	5
Licenses	7, 24,63, 66
Designations	CFP, CFA

REVENUE

100% RECURRING
0% NON-RECURRING

HISTORICAL REVENUE

2018	2019	2020	2021	T12
$1,885,030	$1,915,266	$2,137,993	$2,562,098	$2,654,335

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LOCATION	REVENUE	ASKING
Tampa Bay, Florida	$2,654,335	Negotiable

TECH STACK

Portfolio Management	BD/Custodial Platform
CRM	Redtail

CLIENT DEMOGRAPHICS
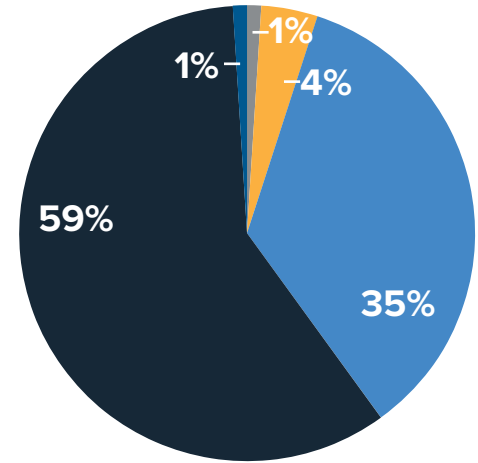
- <30 YRS
- 31–50 YRS
- 51–70 YRS
- OVER 70 YRS
- CORP./INSTITUTIONAL

SOURCES OF REVENUE

	RECURRING	NON-RECURRING
FEE INCOME		
Fees from Advisory	$1,971,078	
COMMISSION INCOME		
Mutual Funds	$38,363	
Variable Annuities	$600,344	
INSURANCE INCOME		
Universal Life	$1,192	
Fixed Annuities	$43,358	
TOTALS		
	$2,654,335	

REVENUE SOURCES
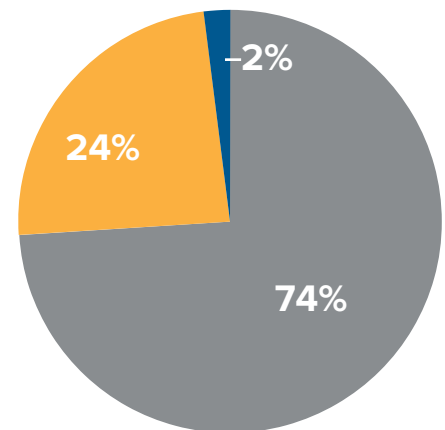
- FEE BASED INCOME
- COMMISSION INCOME
- INSURANCE INCOME