



Listing #2875
Listing Agent: S. Stricker

Independent Financial Management Firm

Type of Business:

This Independent Financial Management Firm for sale in Eastern Iowa has been working with individuals and businesses on investment and retirement planning for 26 years. With their dedicated staff and independent status, the company has set themselves apart from branded agencies by placing a strong focus on what is best for their customer. With over 1,000 clients, the business has grown through word of mouth, workshops and educational dinners. The business is located in a well-maintained 2,800 square foot building in a larger metropolitan area.

Market Opportunity:

This business can be grown by adding one or more financial planners to increase its client base and by expanding its marketing efforts. Additional complementary services such as Medicare insurance and tax preparation services could also grow the company as existing clients have already expressed interest in these areas.

Reason for Selling:

After a reasonable transition period, the owner would like to retire.

Financial Statistics:

Outlined below is a snapshot of the revenue for the past three years and year-to-date.

	<u>3 MO. 2018</u>	<u>2017</u>	<u>2016</u>	<u>2015</u>
Revenue	\$273,043	\$965,470	\$934,531	\$921,205
N.O.B.	\$178,627	\$613,516	\$449,829	\$503,289

* Net Owner Benefit (N.O.B.) is the amount of cash generated by the business to be used at the discretion of the owner.

The Selling Price is **\$1,750,000**, which includes real estate at **\$450,000**, and all assets as shown on the asset list.

Real Estate offered through Scott Stricker, Next Generation Realty, 2011 NW 100th St., Clive, IA 50325.

Disclaimer: The information contained in this document is taken from sources provided by the seller and is not warranted or guaranteed by the Broker. Its content has been approved by the Seller and is subject to corrections and /or changes.

FOR MORE INFORMATION ON THIS OUTSTANDING ACQUISITION OPPORTUNITY, PLEASE CONTACT:

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