AdvisorBridge

WHERE POSSIBILITY AND OPPORTUNITY MEET

BUYER: GTA10210

Full Stack Discretionary Portfolio Management Team in Oakville interested in buying books/practices in Golden Horseshoe

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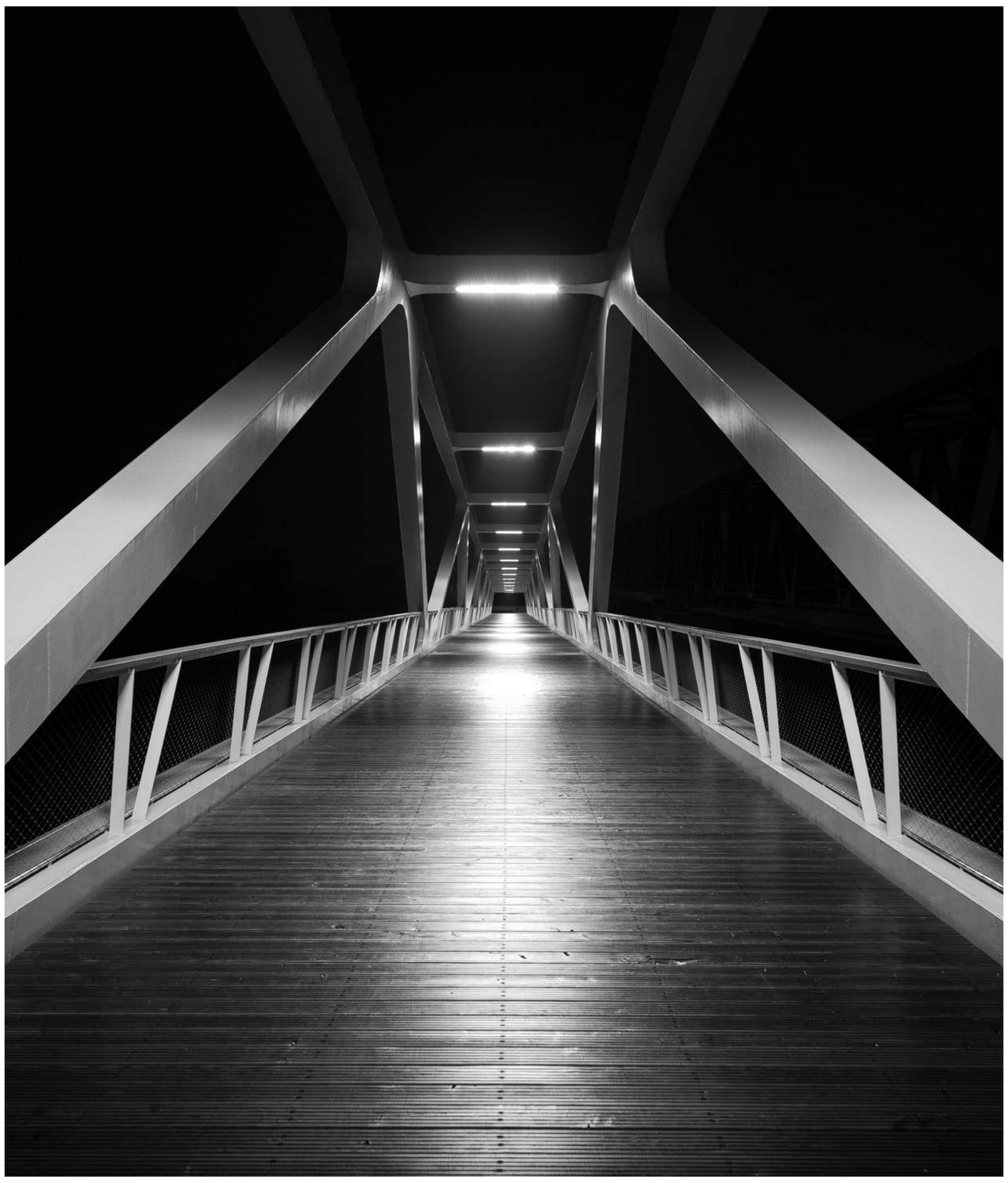
BUYER PROFILE



Located in Oakville our Buyers form a team of exceptionally qualified wealth management professionals. The group consists of two Portfolio Managers and a licensed Associate Advisor. The lead PM is an industry veteran with over 30 years in the business. His Associate PM and Associate Advisor have 15 and 25 years of experience respectively.

This team offers clients a complete wealth management experience within a Family Office environment. As discretionary Portfolio Managers and Risk Managers, the team takes its fiduciary responsibilities very seriously, ensuring each and every client is offered a consistently high standard of care and diligence.

BUYER BUSINESS PROFILE

Our Buyer operates his practice as a Full Service Family Office. This wealth management model is intended to build deep and long lasting relationships with clients over multiple generations. This is accomplished through a suite of unique services including integrated financial planning, family continuity, business consulting, transition services, asset consulting and family administration. The team has built strong relationships with external subject matter experts allowing them to provide customized solutions to complex problems that confront HNW families.

The team takes a conservative approach to the portfolio management where the overall goal is to be flexible, realistic and manageable. They offer a broad range of mandates with added layers of tactical portfolio management not normally available to most investors. The overall goal is to manage risk by protecting capital and provide a reasonable return over the rate of inflation. The practice is 100% fee based.

The team provides a deeply personalized service with multiple touch points of communication, frequently travelling to meet with their clients.

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SELLER PROFILE

This elite and caring team of professionals is seeking a Seller who truly cares about their clients and the legacy of their practice.

Our Buyer is able to accommodate practices or that portion of a practice where the minimum household AUA/AUM is $300,000.00.

This is an excellent opportunity for a retiring advisor to pass their client relationships on to a team with a very robust and transparent service offering.

If you are considering retiring in the next 1 to 5 years please contact us to find out more about this opportunity.

OFFER

Purchase Price: Negotiable and Flexible

Payment/Transition Details: The Buyer is open and willing to accommodate a number of different scenarios to suit the exiting Advisor depending on the circumstances.

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