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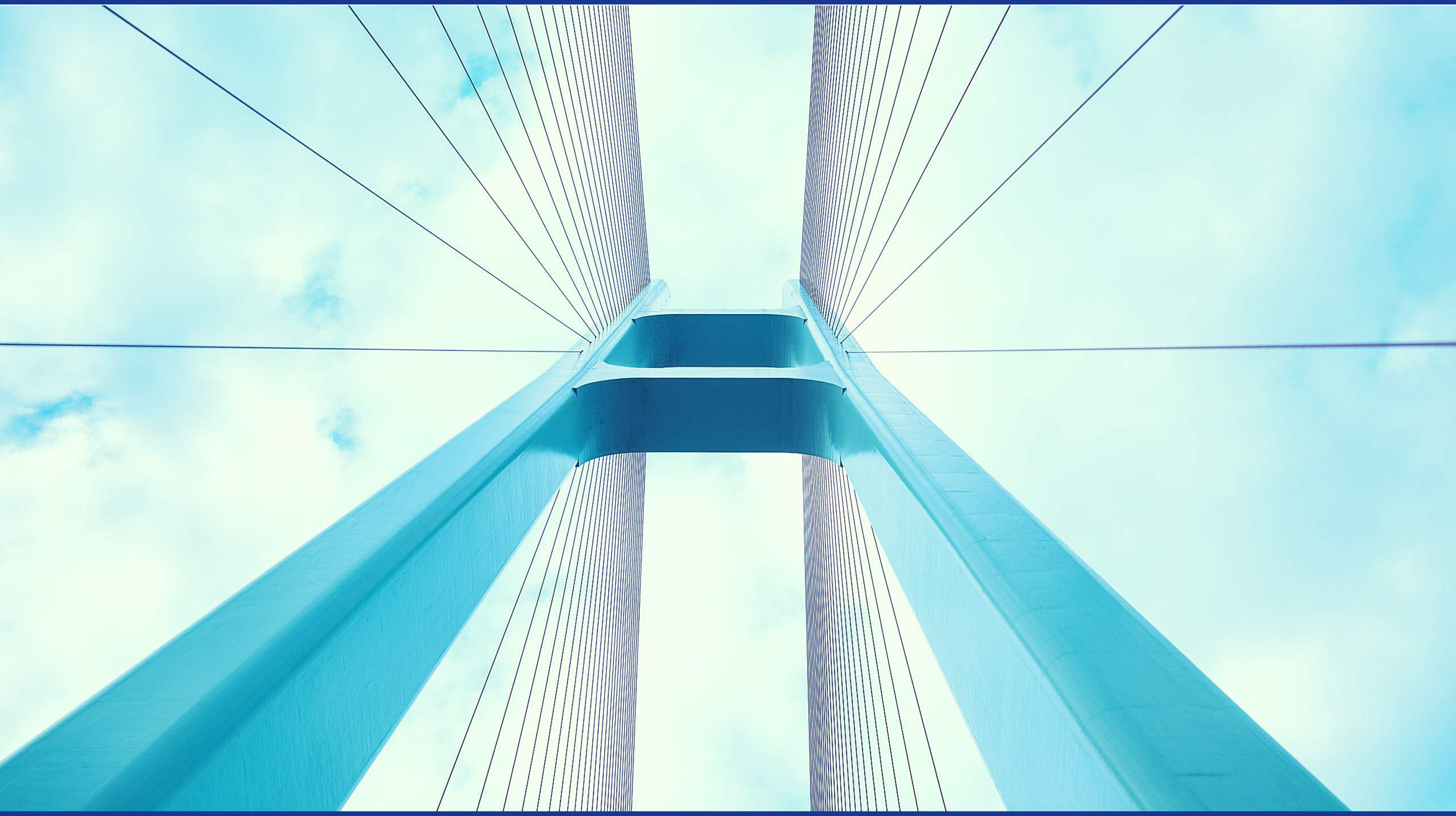
WHERE POSSIBILITY AND OPPORTUNITY MEET



BUYER: SWO10184

Full Service Portfolio Manager in the London, ON region looking to Purchase a Book of Business.

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BUYER PROFILE

Our Buyer is a full service Portfolio Manager at a bank owned IIROC dealer.

With over 10 years in the industry, a CFP®, and a BComm our Buyer is well credentialed, experienced and established. Still in his early 30's he has many years of service ahead.

Our Buyer is service driven and runs a very client-centric practice where the focus is on client education and being highly responsive to client needs.

BUYER BUSINESS PROFILE

The core service offerings of our Buyer is further supported by best in class software for financial planning, investment analysis, client risk analysis and portfolio management.

Client portfolios are invested with a focus on high risk adjusted returns and tax efficiency.

Portfolios are actively re-balanced in accordance with each clients custom Investment Policy Statement.

Our Buyer takes a team based, comprehensive approach to Wealth Management incorporating retirement planning, estate planning, trusts, risk management and investment management into their practice.

Our Buyer is with one of the 5 major banks.

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SELLER PROFILE

Our Buyer would like to incorporate approximately 100 additional households to his practice. This level of onboarding would ensure his high service standards.

The Buyer is able to take on households with a minimum of $400,000.00 in AUA.

This is an excellent opportunity for an existing Advisor who is looking for a highly qualified professional with a comprehensive wealth management offering and can work with your clients for the next 30 years.

Our Buyer would be a great fit for a retiring advisor in the London and surrounding area.

If you are thinking about retiring in the next 1-5 years please contact AdvisorBridge to discuss this possibility further.

OFFER

Purchase Price: Negotiable and Flexible

Transition: The team anticipates an onboarding and transition period that will be completed within 12 months of the execution of an agreement.

Payment: A down payment of up to 30% of the deal size is offered with the balance paid on an earn out basis on a schedule suited to the seller.

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