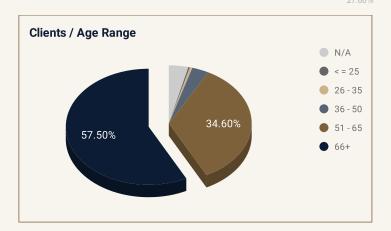
## **Opportunity Profile: ON373**

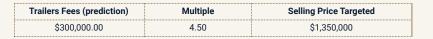
Location	-
East GTA - Ontario	

General Information		
Type of Transaction	Share	
Assets Under Management	\$36,477,514	
Would change dealer?	No	
Dealer	IPC	
Spoken language required	English	
Licenses	Insurance & MFDA	
Financial Planning	Yes	
# Years in the industry	Over 35	
CRM & Digitilized	Yes	
Revenue	\$360,000	
Number of Clients	298	
Number of Households	255	
Number of Plans	521	
Number of Holdings	743	
Office rent	No	

Investments type	Assets \$
CMA	\$1,825.87
GIC	\$95,351.70
LSF	\$648.98
MTF	\$35,133,980.32
SEG	\$1,245,707.17

Top 5 Funds Cies	Assets \$	
Mackenzie Monthly Income Balanced Portfolio Series PW	\$2,674,072	7.33
Mac Symmetru Growth Portfolio Series PW	\$2,413,092	6.52
Manulife Canadian Dividend Growth Fund Advisor Series	\$1,851,215	5.07
Mackenzie Bliewater Canadian Growth Fund Series PW	\$1,774,471	4.86
Fidelity Global Monthly Income Fund Series B	\$1,414,021	3.88





## Dialogue Box

An interesting opportunity with enormous potential, since the seller wishes to sell and stay for another five to ten years. The selling advisor is open to managing clients for a decent salary, should the buyer not be from Ontario.

A qualified assistant, licensed, has been working alongside him for over five years. She will stay on after the transaction to support the seller. She currently works a reduced schedule of four days a week, and more or less five hours a day.

The owner is a "rain maker" personality with a great deal of ability, despite being in his early sixties.

