



Location

Montreal, QC

Recurring Revenues

\$206,669

Multiple

4.50

Selling Price Targeted

\$930,008

General Information

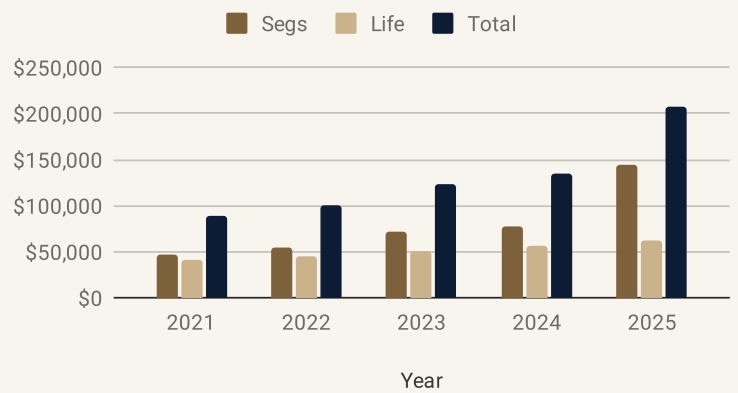
Type of Transaction	Share
MGA	IDC
Practice Status	Incorporated
Spoken language required	EN, FR, Italien
Licenses	Insurance
Financial Planning	Yes
# Years in the industry	>44 years
CRM	No
Type of investment	Segs Funds
Assets Under Management	\$15,000,000
Number of Households	70
Investment Breakdown (Household)	\$214,286
Number of Clients	135
Investment Breakdown (Client)	\$111,111
Active Provinces	QC only

Dialogue Box

- Five (5) generations of customers
- Paper files, but:
- Computerized customer list
- Computerized investment portfolio reports
- Over \$200,000 in FYC and Bonus revenues every year
- **By 2025, no SDC on the books**
- **Recurring investment income will double by 2025**
- Many new insurance and segregated fund sales
- Advisor wants to stay a few years to make the transition

Total Annual Recurring Revenue (A.R.R.)

(2023 prorata 7 months/ 2025, ARR will double with Segs)



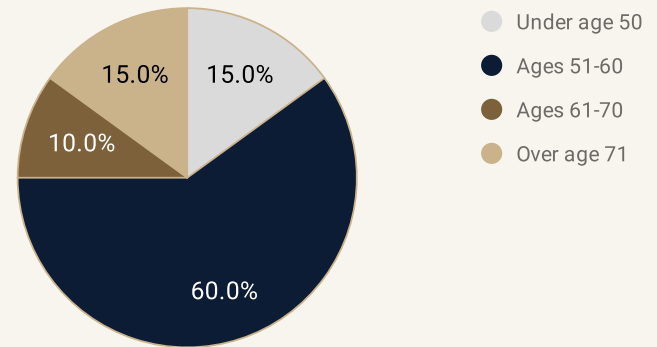
Segrageted: carriers' ranking

RBC	1
Ind. Alliance	2
Manulife	3
Empire	4

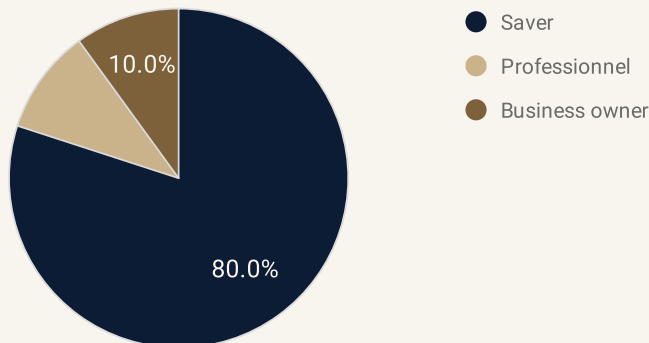
Life FYC : carriers' ranking

Ind. Alliance	1
Beneva	2
Manulife	3
Empire	4

Demography



Client type



Product Type

