Queenston.		Opportunity Profile - MB641	
MB			
Access fee	\$750	English: To access the financial analysis prepared by Queenston, a fee is required after the signing of the confidentiality and fee agreements. This fee is non-refundable. Subsequently, a fee is required to submit a	
LOI fee	\$1,000	confidentiality and fee agreements. This fee is non-refundable. Subsequently, a fee is required to submit a letter of intent. This latter amount is credited against our fees if you are the selected buyer. In the event that you are not selected, the fee remains credited for 12 months against any future transaction finalized with	
General Information		Queenston. To proceed with the purchase process, please email us to request the confidentiality agreement and Queenston's fee agreement for electronic signature.	
Type of transaction	Share		
Type of Revenue	Fee Based & Financial & Estate Planning	French: Pour accéder à l'analyse financière préparée par Queenston, un frais est exigible après la signature de l'entent de confidentialité et de nos honoraires. Ce frais est nom-remboursable. Par la suite, un frais est requis pour déposer une lettre d'intention. Ce dernier montant est crédité contre nos honoraires, si vous êtes l'acheteur sélectionné. Dans le cas où vous ne seriez pas sélectionné, le frais restera créditable pendant 12 mois contre toute transaction future finalisée avec Queenston. Pour poursuivre le processus d'achat, veuillez nous envoyer un courriel pour demander l'accord de confidentialité et la convention d'honoraires de Queenston pour signature electronique.	
Technology level used	Advanced		
# of Employees	6	MB-641, a premier financial services company specializing in wealth management and estate planning, is now available for acquisition. With a robust portfolio of personalized investment strategies, asset management, and comprehensive financial advisory services. MB-641 has built a strong reputation and loyal client base. The company's integrated approach to wealth management and estate planning ensures clients financial goals are met and their wealth is preserved across generations. Additionally, MB-641 has invested significantly in upgrading its technological infrastructure, positioning itself for future growth and success. The ideal buyer for MB-641 is an entity with a CIRO-IIROC (Investment Industry Regulatory Organization of Canada) license, ensuring compliance with industry standards and regulations.	
# of Employees Licensed	2		
Employee Age Average	43		
Employee will stay	6		
Office Space	2000 sq.ft.		
Lease Term	10 years	Furthermore, the buyer should maintain the assets under management with the actual investment dealer, preserving the existing client relationships and continuity of service. It is also	
Licensing Status	CIRO-IIROC	crucial for the buyer to retain the current team, particularly the CEO and President, to maintain	
Transition Period	Minimum 2 years	operational stability and leverage their deep expertise and leadership in the transition period. This continuity will ensure that MB-641 continues to thrive and provide exceptional service to its	

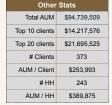
Recurring Revenue Only				
Fiscal Year End: June	2024	2023		
Group Insurance	\$0	\$0		
Individual Insurance	\$0	\$0		
Services Income	\$38,869	\$26,359		
Fees and Commissions	\$877,078	\$820,281		
Other income	\$359	\$162		
Total	\$916,306	\$846,802		

Estate & Financial PI. Advance Level clients.

Over 56% of the AUM is under Managed Accounts

AUM by Account Type

40.00%



< 50 y.o.

> 50 < 60 y.o.

