

Net Annual Recurring Revenue

\$10,500

Asking

\$25,000

English:

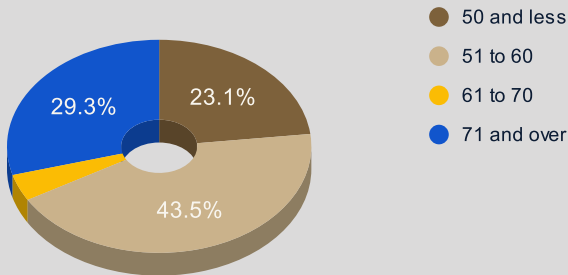
This is a small block of business from a financial security advisor who wants to focus on segregated funds. The opportunity may lead to the eventual acquisition of the advisor's entire business as he approaches retirement.

French:

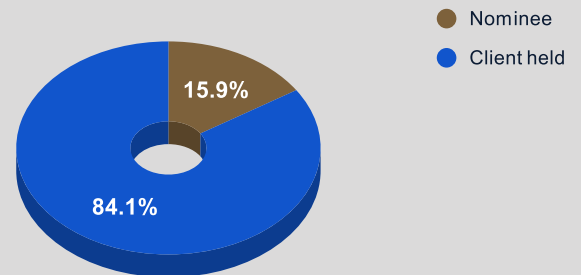
Il s'agit d'un petit bloc d'affaires d'un conseiller en sécurité financière désirant se concentrer sur les fonds distincts. L'opportunité peut conduire à l'acquisition éventuellement de la totalité des affaires de se conseiller approchant la retraite.

MTL	QC	General Information			
Access fee	\$0	Nominees account	10	Number of accounts	26
LOI fee	\$0	Client held	53	Total AUM	\$1,219,398
Minimum Q's Fee	\$10,000	Age Average	59	Average \$ / Account	\$46,900
Type of transaction	Asset	Client file	Paper	Dealer	SFL
Type of Revenue	Fee based	CRM	None	Transfert out	Yes

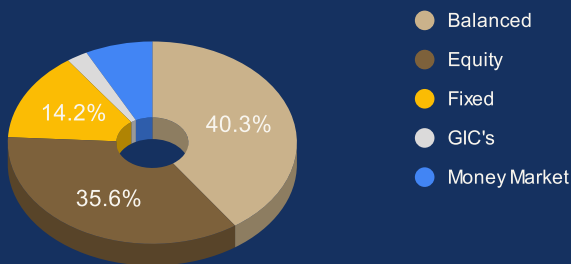
AUM / Age level



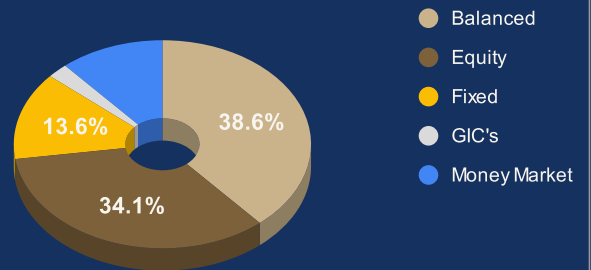
Account type



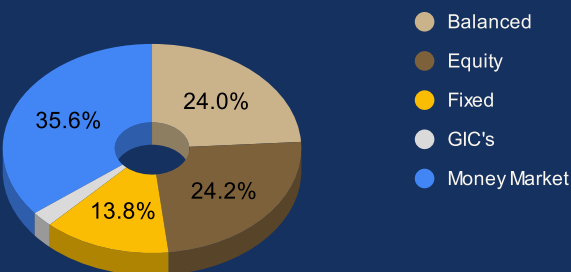
Asset Class



Number of Accounts



% of Total Assets



Total Assets

