Queenston.

Opportunity Profile : ON-4851

Lead Consultant: J-F Murphy F. Mobile: 204-400-1112

Kitchener	ON
Access fee	$300
LOI fee	$700
General Information	
Type of transaction	Assets
Type of Revenue	Gross Recurring Revenue
CRM used	OneBoss / Wealthserv
# of Employees	n/a
# of Employees Licensed	n/a
MGA	IDC
Dealer	Sterling Mutual
Lease Term	n/a
Licensing Status	IFIC & Insurance
Transition Period	12 mois
AUM	$10,800,000
Total Investment clients	140
Average AUM / Client	$77,143
Total HH count	95
Average AUM / HH	$113,684

English:
If selling price is under $200,000, a minimum fee is required to cover the costs associated with opening discussions and files. Please note that there is no financial analysis, confidential memorandum, or valuation report provided for these listings. This fee is non-refundable. Should you wish to proceed with a letter of intent, an additional fee will be required, which will be credited against our fees if you are the selected buyer. If not selected, this amount remains credited for 12 months toward any future transaction with Queenston. To initiate the process, please email us to request the confidentiality agreement and Queenston's fee agreement for electronic signature.

Français:
Si le prix de vente est sous les 200,000$, un frais minimum est exigé pour couvrir les coûts liés à l'ouverture des discussions et du dossier. Veuillez noter qu'aucune analyse financière, mémorandum confidentiel ou rapport d'évaluation n'est fourni pour ces annonces. Ce frais est non-remboursable. Si vous souhaitez procéder avec une lettre d'intention, un frais supplémentaire sera requis, qui sera crédité contre nos honoraires si vous êtes l'acheteur sélectionné. Dans le cas contraire, ce montant restera créditable pendant 12 mois pour toute transaction future avec Queenston. Pour entamer le processus, veuillez nous envoyer un courriel pour demander l'accord de confidentialité et la convention d'honoraires de Queenston pour signature électronique.

Gross Recurring Revenues	$88,394	Asking price	$353,576

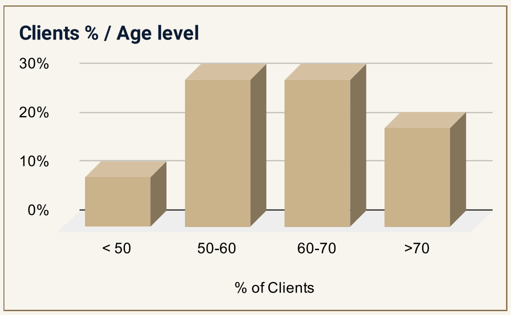
Seize the opportunity to acquire a well-established wealth management book with $11 million in assets under management and a stable, recurring revenue stream of $86,000 annually. Ideal for an ambitious advisor looking to expand their client base, this portfolio combines steady income with growth potential.

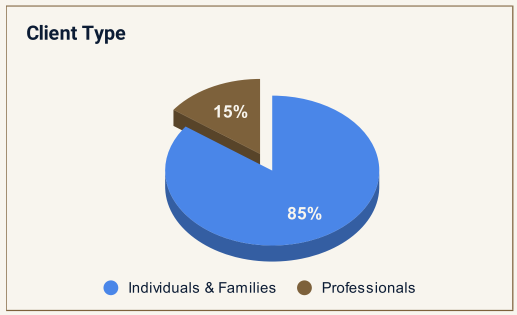
The current advisor, known for dedication and integrity, is transitioning to pursue other interests full-time but is committed to supporting a seamless handover. They are prepared to offer guidance in a referral role or remain involved on a salaried basis to help build client trust and ensure continuity.

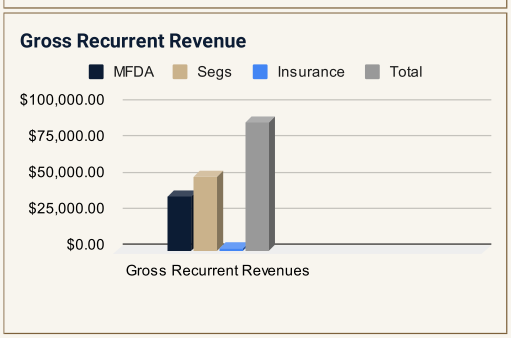
Don't miss out on this ready-made, scalable book of business.

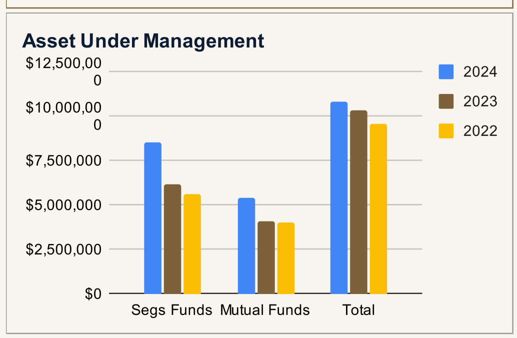
% Asset Type	
TSFA	25%
RRIF	15%
RRSP	35%
LIF	15%
LIRA	10%
Total	100%

Ideal Buyer				
Type	Fee	Commission		
Location	GTA	West Ontario		
Client Servicing	In-person	Video	Phone	Remote
Servivce Offerings	Estate Planning	Financial Planning	Insurance Guidance	Wealth Management
Investment Vehicules	Mutual Funds	Segs Funds		
Investment Strategies	Active			









Client geography map