

# PurchasingPower™ Profile



## FIRM OVERVIEW

Business Name

Location

Firm Website

Business Owners (list all)

Firm Description



## BUSINESS OVERVIEW

AUM

Revenue

Number of Households

Average Account Size

Number of Staff

Staff Credentials



## PREVIOUS ACQUISITION HISTORY

Number of Acquisitions Completed

AUM Acquired

Year Acquired



## FUTURE ACQUISITION OBJECTIVES

Desired Acquisition Size Range

Desired Geographic Location

My Service Niche or Investment Specialty



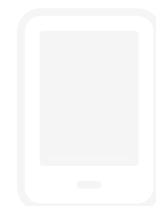
## BUYER CONTACT INFORMATION

Name

Phone

Email Address

Mobile



### What does "PurchasingPower Verified" mean?

**PurchasingPower™** is a scoring methodology that gauges the credit worthiness and readiness of a buyer's ability to acquire another wealth management practice. Some key factors that determine a buyer's PurchasingPower™ are the completion of a practice profile on [www.APBOE.com](http://www.APBOE.com), a current valuation from a verified valuation provider, a banking relationship with a bank who funds advisory loans, and liquidity for down payment. In addition, a verified PurchasingPower buyer has submitted documentation via a secure portal that substantiates this information. These buyers have done the pre-requisite work to secure financing for M&A transactions.