




Listing #: 18080 **Title:** Rarely Offered Profitable Fiduciary for Sale
SIC Code: 6289 **Category:** Professional Practices
County: Confidential **City:** Confidential **Zip/Postal Code:** Confidential **State/Prov:** California **Country:** United States



Status	Active
Listed Price	\$219,000
Down Payment	\$219,000
Discretionary Earnings	\$124,273
Revenue	\$219,613
Total Assets Included	
Real Estate Included in Price	-

Business Description

Provides ethical financial services, managing trusts, estates, and investments with the utmost integrity. Their client-centric approach ensures personalized solutions, building trust through transparency. As industry leaders, they navigate complex financial landscapes, fostering long-term success and security for their clients.



Contact Information
Terry Watts
Business Intermediary
DRE#02191771

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Facilities/Location/Real Estate

This business is ran from the seller's home.

Historical Financial Summary

Data Source	P/L Statement	P/L Statement	Tax Return	Tax Return	Tax Return
Year (Cash Flow)	2024	2023	2022	2021	2020
Gross Revenue	\$219,613	\$217,988	\$208,099	\$161,174	\$263,740
Gross Profit	\$219,613	\$217,988	\$208,099	\$161,174	\$263,740
Expenses	\$95,340	\$95,382	\$73,714	\$24,941	\$28,427
Net	\$124,273	\$122,606	\$134,385	\$136,233	\$235,313
Benefits					
Depreciation	\$0	\$0	\$52,056	\$0	\$8
Total Add Backs	\$0	\$20,617	\$61,230	\$11,369	\$8,225
Owner Benefit	\$124,273	\$143,223	\$195,615	\$147,602	\$243,538

Reason For Sale

Seller is retiring and would like to venture into other opportunities.

Products, Services & Licenses

Bachelors Degree with no experience
 Associates Degree with 3 years experience
 No Degree with 5 years experience
 AND
 Take the required course (30 hours) and pass the state examination.

Operations

Year Established 2012
 Year Owned 2012
 Form of Ownership Sole Proprietorship
 Absentee Owner No
 Hours Owner Works 40
 Days & Hours Monday-Saturday 7am-7pm
 Number of Employees - ft - pt
 Managers -

Location

Type of Location Home Based
 Square Footage -
 Lease/Month -
 Lease Expires -
 Terms & Options -
 Relocatable Yes
 Home Based Yes
 Franchise No

Assets/Liabilities

Accounts Receivable
 Inventory
 F F & E
 Leasehold

Amount

-
 -
 -
 -

Included in Sale

Real Estate
 Liabilities
 Other
 Total Assets

Amount

-
 -
 -
 -

Included in Sale

Assets/Liabilities Comments

A customer list will be sold with the business. The Seller is willing to work with the buyer up to a year to transition clientele.

Financing/Terms

Assumable Notes Amount: \$0
 Seller Financing - Business Amount: \$0
 Third Party Financing Amount: \$0
 Seller Financing - Real Estate Amount: \$0

Lender Prequalified: No

Mos: 0
 Mos: 0
 Mos: 0
 Mos: 0

Rate: 0.00%

Rate: 0.00%
 Rate: 0.00%
 Rate: 0.00%
 Rate: 0.00%

Visa Qualified: No

Mo. Pmt: \$0
 Mo. Pmt: \$0
 Mo. Pmt: \$0
 Mo. Pmt: \$0

Financing Comments

Non Compete 50 miles 5 years

Training & Support 3 weeks \$0 costs

Competition

Intense local competition presents challenges and opportunities but this business stand out, because they focus on specialization, trust-building, technology integration, and competitive pricing.

Potential for Growth

The fiduciary business holds significant growth potential due to increasing demand for trustworthy fiduciary services. As individuals and businesses prioritize prudent financial management, the fiduciary sector stands poised for expansion, driven by a growing awareness of the value of professional fiduciary expertise and ethical financial stewardship.

Detail Income Statement Add Backs

Data Source	P/L Statement	P/L Statement	Tax Return	Tax Return	Tax Return
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Year (Cash Flow)	2024	2023	2022	2021	2020
Revenue					
Expenses					
Rents	\$0	\$12,413	\$0	\$0	\$0
Depreciation	\$0	\$0	\$52,056	\$0	\$8
Auto Expenses	\$0	\$0	\$6,467	\$8,765	\$6,158
Travel	\$0	\$0	\$0	\$0	\$920
Meals	\$0	\$1,962	\$2,707	\$2,604	\$1,139
Lawn Services	\$0	\$840	\$0	\$0	\$0
Pest Control	\$0	\$724	\$0	\$0	\$0
Pool Service	\$0	\$924	\$0	\$0	\$0
Security	\$0	\$483	\$0	\$0	\$0
Home Owners Insurance	\$0	\$3,271	\$0	\$0	\$0
Total Add Backs	\$0	\$20,617	\$61,230	\$11,369	\$8,225

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