


Background

General Location: USA, CA
Category: Finance, Banking, Loans & Leasing
 Consumer Services (B2C)
Years in Business: 10
Under Present Owner: 10
Hours of Operation: M-F, 9:00 - 5:00
Owner Hours: Varies
Training: 4 weeks @ 30 hours
Organization Type: LLC
Lease Expiration: M2M
Lease Options: Buyer can relocate or sign new lease
Building Size:
Employees: 2
Reason for Sale: Semi Retirement

Financials

Asking Price: \$4,900,000
Down Payment: Negotiable
Gross Sales: \$1,000,000
Discretionary Cash Flow: \$800,000
FF&E: \$5,000
Inventory Included? Yes
Inventory: \$1,000
Min. Operating Capital: TBD
Real Estate Available? No
Rent: \$1,650
Payroll: \$6,000
Financing: Call

Broker Info


Eric Mellem
 Business Broker/ M&A Advisor
 (310) 882-2200 x 146
 LIC# 1220802

Summary
Specialized Residential Financing Advisory Firm

This highly Niche and Profitable company serves high-net-worth (HNW) and ultra-high-net-worth (UHNW) clients seeking residential financing of \$1 million or more - no maximum loan amount.

A typical Client is a Multimillionaire, a Billionaire or a well know figure looking for connected Advisors to secure complex, multimillion dollar loans amount involving substantial assets, nontraditional income, trust and LLC ownership, luxury real estate acquisitions, refinancing, construction loans, and other customized financing solutions.

Important Note: The company or buyer DOES NOT require a Mortgage License, a Real Estate License or any financial certificates. They are Advisors not Lenders.

The company operates throughout the USA but based in California. They conduct the operations entirely through calls, Zoom and email. A buyer can be located anywhere and run the business.

The owners are well respected and connected and work with Elite Lending Institutions, Private Banks and International Financial Institutions. These relationships can effective be nurtured and handed off to a legitimate buyer group. The sellers are open to stay on Post-Close for a prolonged period of time, to be negotiated.

Clients are secured through a vast network of Top Wealth and Financial Advisors, Luxury Real Estate Agents, CPAs with high net Worth Clients, Advisors and Attorneys to well-know and celebrity clients, and they have recently implemented a highly effect social media campaign.

The company has 2 employees - a COO and a Social Media Marketer and the owners, in their 80s, also work part-time and mostly remote.

There is a tremendous Growth Opportunity and scale out the business Revenue and Profits.

The sellers are flexible on sale and transfer terms for a qualified buyer. A buyer does not need to be in the industry currently and a strong business background would be required.

For more information, Register as a Buyer at www.bizex.net and then contact Eric Mellem, Senior Broker representing the company.