



TIBURON STRATEGIC ADVISORS

Strategy Consultants to Financial Institutions

*Financial Institutions Profiles Series*

# Covestor: A Supermarket of Money Managers

---

(Table of Contents)



*June 16, 2014*

**TABLE OF CONTENTS**

History.....

- Early Phase .....
- Middle Phase.....
- Asheesh Advani Phase.....

Statistics.....

- Offices .....
- Employees .....
- Clients .....
- Accounts .....
- Assets Under Administration .....
- Net Flows .....
- Revenues .....
- Net Profits.....

Services .....

- Service One .....
- Service Two .....

Organization & Ownership.....

- Organizational Structure .....

  - Organizational Chart .....
  - Board of Directors .....

- Ownership .....

  - Privately Owned .....
  - Assets .....
  - Liabilities .....
  - Shareholders Equity.....
  - Earnings Per Share.....
  - Dividends Per Share .....
  - Dividend Yield .....
  - Stock Price.....
  - Shares Outstanding .....
  - Market Capitalization.....
  - Ownership by Owner.....
  - Stock Volume.....

