



TIBURON STRATEGIC ADVISORS

Strategy Consultants to Financial Institutions

Financial Institutions Profiles Series

**Fisher Investments:
The Largest Fee-Based Financial Advisor**

(Table of Contents)



October 2011

TABLE OF CONTENTS

- History.....
- Institutional Only Phase.....
- Early Private Client Focus & Key Staff Acquisitions Phase.....
- Success Phase
- Statistics
- Offices.....
- Employees
- Clients.....
- Assets Under Management.....
- Revenues.....
- Net Profits
- Businesses.....
- Private Client Group.....
- Statistics
- Outside Sales People.....
- Inside Sales People
- Prospects
- Leads
- Clients.....
- Accounts
- New Assets Under Management.....
- Assets Under Management.....
- Average Account Size
- Revenues.....
- Net Profits
- Purissima Funds.....
- Institutional Group
- Statistics
- Institutional Clients
- New Assets Under Management.....
- Assets Under Management.....
- Revenues.....
- Net Profits
- Institutional Foreign Equity Fund.....
- Organization & Ownership
- Organizational Chart
- Ownership.....