

# Advisor Tools

A Leading East Lansing, MI  
Based Technology Company

Tiburon Written Research  
April 22, 2019



**TIBURON STRATEGIC ADVISORS**

Industry Leading Think Tank, Advisor, and Investor in  
Wealth & Investment Management (and Related WealthTech) Firms

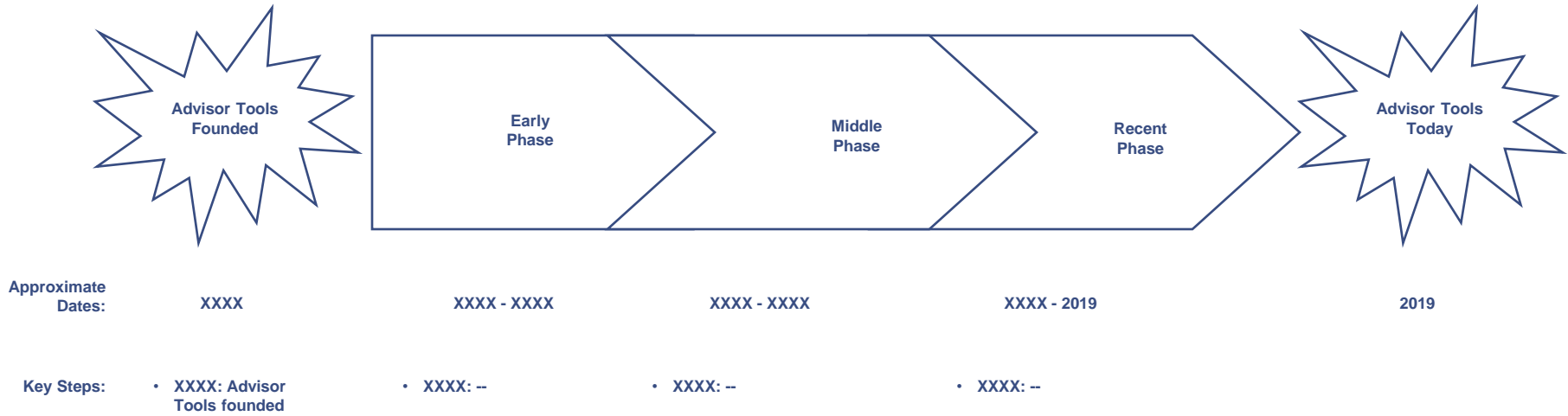
**AdvisorTools.com**

## Comments

- **Founded in XXXX**
- **Based in East Lansing, MI**
- **President: Kathy Colby**
- **Web Site: [www.TheAdvisorsEdge.Com](http://www.TheAdvisorsEdge.Com),  
[www.Harvest-Time.Net](http://www.Harvest-Time.Net)**

# Advisor Tools was Founded in XXXX and Has Subsequently Evolved through its Early, Middle, & Recent Phases

## Advisor Tools History



**AdvisorTools.com**

***AdvisorTools.com***

<b>Comments</b>
<ul style="list-style-type: none"><li>• <b>Founded in XXXX</b></li><li>• <b>Based in East Lansing, MI</b></li></ul>

# Advisor Tools is Not a Frequent Advertiser

Advertising

## Comments

- --

**AdvisorTools.com**

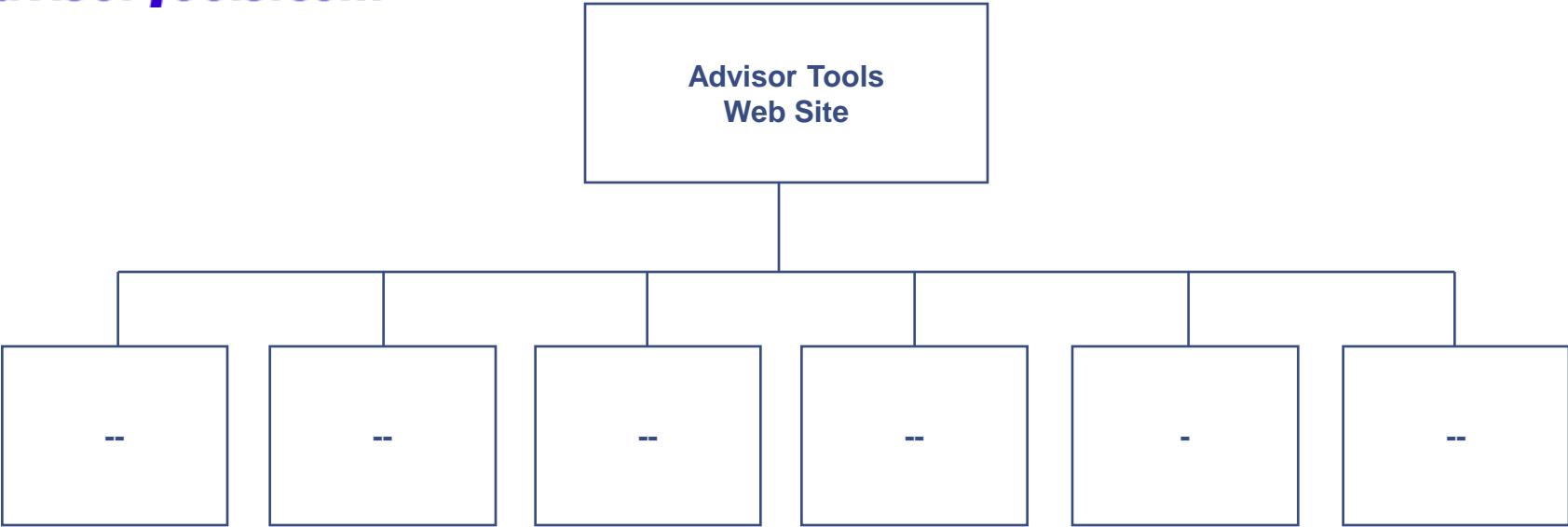
Source: Tiburon Research & Analysis

# Advisor Tools Has a Web Site with XXXX Core Sections, Including

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## Advisor Tools Web Site

**AdvisorTools.com**



Source: Tiburon Research & Analysis

# Advisor Tools is Not a Frequent Acquirer

Acquisitions

## Comments

- --

**AdvisorTools.com**

Source: Tiburon Research & Analysis

# Advisor Tools Has a Charitable Giving Program

Charitable Giving

## Comments

- --

**AdvisorTools.com**

Source: Tiburon Research & Analysis



# Advisor Tools Has Employees

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Needs data

## Advisor Tools Employees

**AdvisorTools.com**

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2017 2018

# Advisor Tools Serves Clients

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Needs data

**Advisor Tools  
Clients  
(Millions)**

**AdvisorTools.com**

2017 2018

Source: Tiburon Research & Analysis

# Advisor Tools Generates Revenues

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Needs data

## Advisor Tools Revenues (\$ Millions)

**AdvisorTools.com**



Source: Tiburon Research & Analysis

# Advisor Tools Earns \$\_\_\_ Million

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Needs data

## Advisor Tools Net Profits (\$ Millions)

**AdvisorTools.com**



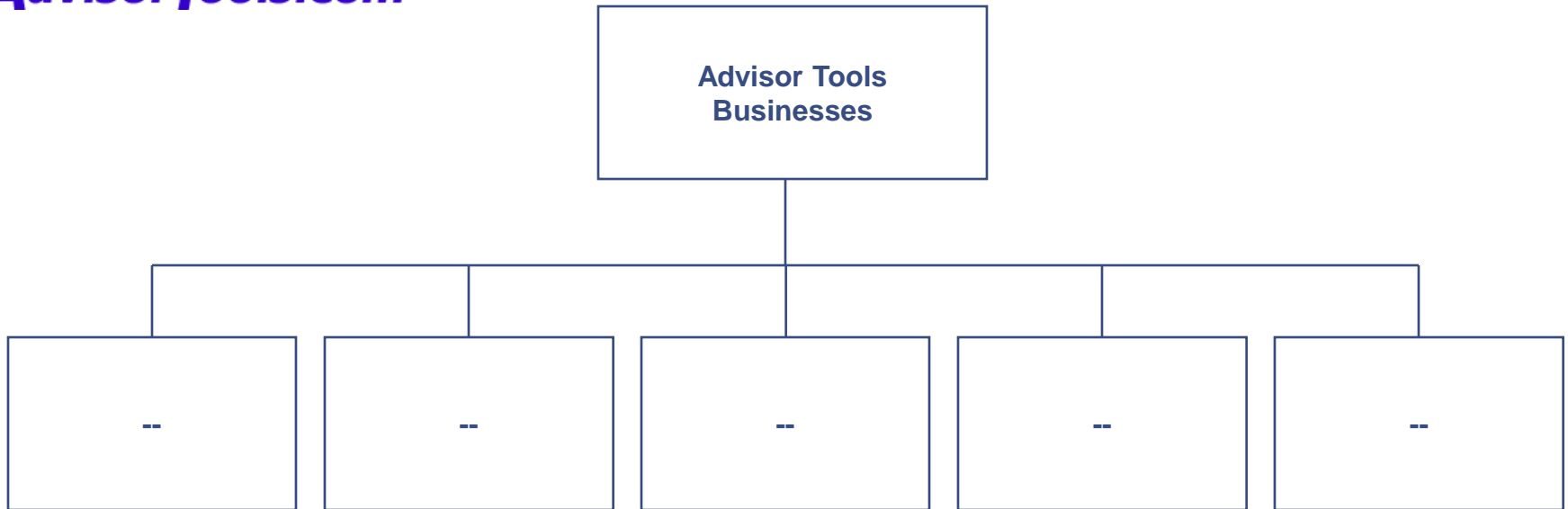
Source: Tiburon Research & Analysis

# Advisor Tools Has a Number of Businesses, Including...

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## Advisor Tools Businesses

**AdvisorTools.com**



# Advisor Tools's First Businesses is \_\_\_\_

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**AdvisorTools.com**

Comments
<ul style="list-style-type: none"><li data-bbox="666 406 743 428">• --</li></ul>

# Advisor Tools's Second Businesses is \_\_\_\_

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**AdvisorTools.com**

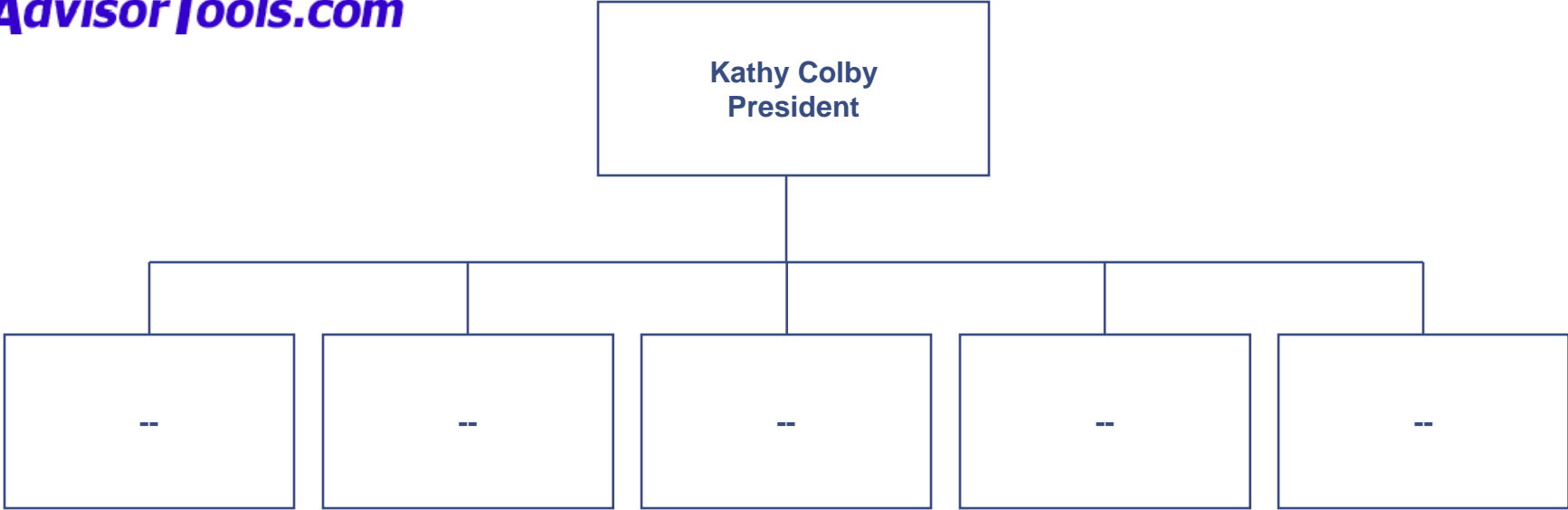
Comments
<ul style="list-style-type: none"><li data-bbox="664 408 741 429">• --</li></ul>

# Advisor Tools is Led by its President Kathy Colby

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## Advisor Tools Organizational Chart

**AdvisorTools.com**



Source: 10/27/05 Advisor Tools Web Site; 4/05 Investment Advisor; Tiburon Research & Analysis

# Advisor Tools Has a Board of Directors Led by its Chairman...

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## Advisor Tools Board of Directors

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• --	• --	• --	• --	• --  <b>AdvisorTools.com</b>

<b>Comments</b>
<ul style="list-style-type: none"><li data-bbox="666 406 743 428">• --</li></ul>

**AdvisorTools.com**

# Advisor Tools Has Assets

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Needs data

**Advisor Tools  
Assets  
(\$ Millions)**

**AdvisorTools.com**

2017 2018

Source: Tiburon Research & Analysis

# Advisor Tools Has Liabilities

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Needs data

## Advisor Tools Liabilities (\$ Millions)

**AdvisorTools.com**

2017 2018

Source: Tiburon Research & Analysis

# Advisor Tools Has Shareholders' Equity

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Needs data

## Advisor Tools Shareholders Equity (\$ Millions)

**AdvisorTools.com**

2017 2018

# Advisor Tools Earns ... Per Share

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Needs data

## Advisor Tools Earnings Per Share

**AdvisorTools.com**

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2017 2018

# Advisor Tools Declares ... Dividends Per Share

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Needs data

## Advisor Tools Dividends Per Share

**AdvisorTools.com**

2017 2018

# Advisor Tools Has a ... Dividend Yield

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Needs data

## Advisor Tools Dividend Yield

**AdvisorTools.com**



# Advisor Tools's Stock Price is ...

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Needs data

## Advisor Tools Stock Price

**AdvisorTools.com**

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2017 2018

# Advisor Tools Has ... Shares Outstanding

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Needs data

## Advisor Tools Shares Outstanding

**AdvisorTools.com**

2017 2018

# Advisor Tools's Market Capitalization is ...

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Needs data

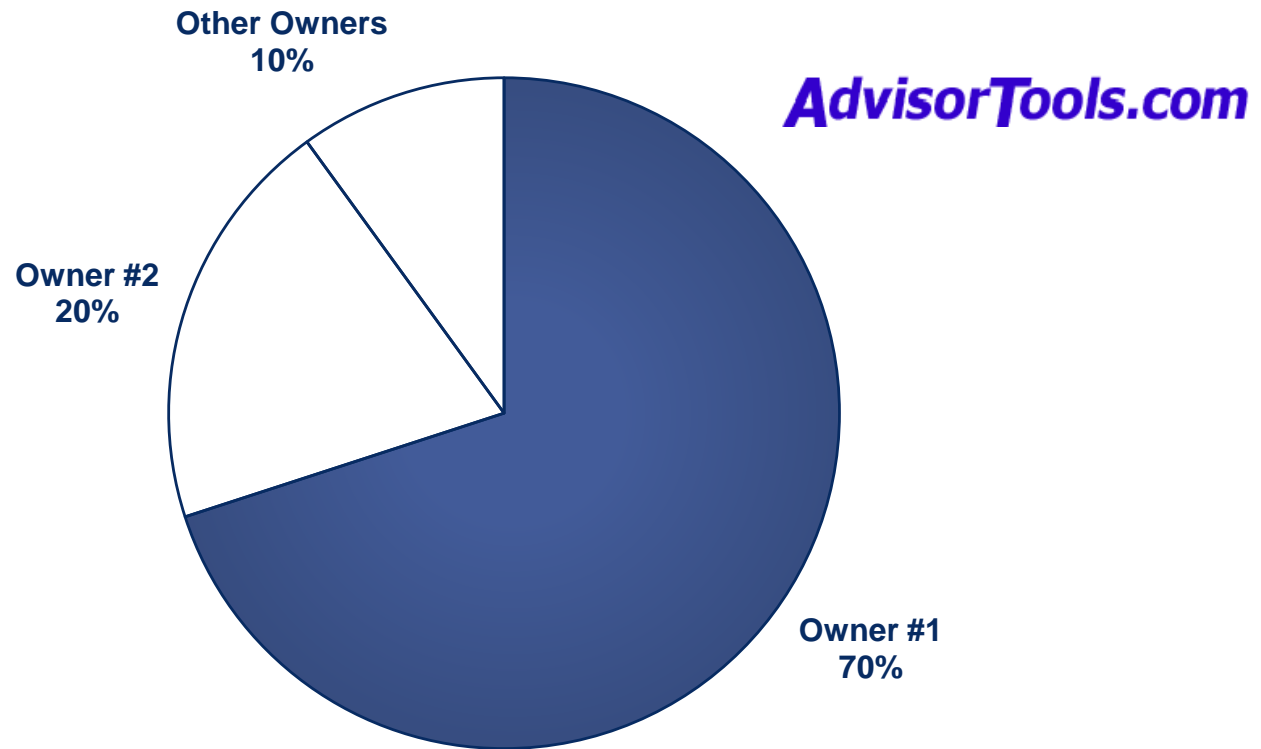
## Advisor Tools Market Capitalization (\$ Millions)

**AdvisorTools.com**



Needs real data

## Advisor Tools Ownership By Owner



# Advisor Tools's Stock Volume is....

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Needs data

## Advisor Tools Stock Volume

**AdvisorTools.com**

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2017 2018



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Wealth & Investment Management (and Related WealthTech) Firms