



TIBURON STRATEGIC ADVISORS

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

Financial Advisor Profiles Series

Aria Retirement Solutions: An Insurance & Annuities Back Office for Financial Advisors

(Table of Contents)



January 13, 2022

TABLE OF CONTENTS

History.....

- Early Phase
- Middle Phase.....
- Recent Phase

Statistics.....

- Offices
- Employees
- Platform Partners.....
- Clients
- Accounts
- Net New Accounts
- Assets Under Administration
- Net New Assets Under Administration
- Revenues
- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA).....
- Net Profits.....

Businesses.....

- RetireOne

 - Statistics

 - Employees
 - Platform Partners
 - Clients
 - Accounts
 - Net New Accounts
 - Assets Under Administration
 - Net New Assets Under Administration
 - Revenues
 - Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA).....
 - Net Profits.....

- Services

 - Annuities.....
 - Life Insurance.....
 - Disability Insurance
 - Structured Notes.....

- Business Two

Organization & Ownership.....

- Organizational Structure

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

Ownership

- Assets
- Liabilities
- Shareholder Equity.....
- Earnings Per Share.....
- Dividends Per Share
- Dividend Yield

Stock Price.....
Shares Outstanding
Market Capitalization.....
Ownership by Owner.....
Stock Volume.....