

Brian Strachan's Team

A Leading Broker at Merrill
Lynch

Tiburon Written Research
January 13, 2019



TIBURON STRATEGIC ADVISORS

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

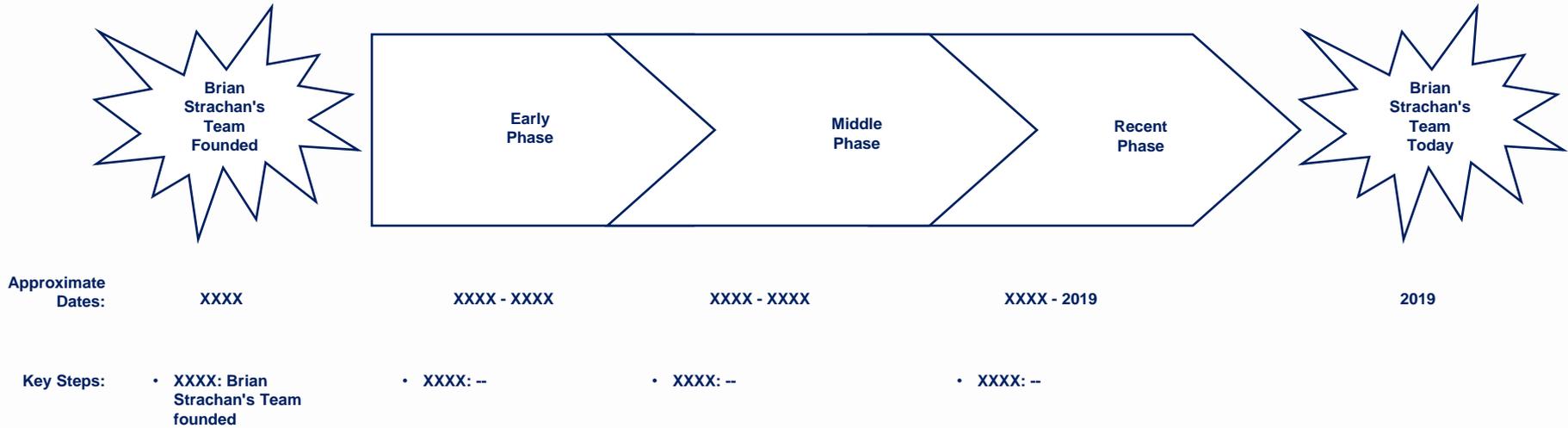
Comments

- **Founded in XXXX**
- **Based in XXXX**



Brian Strachan's Team was Founded in XXXX and Has Subsequently Evolved through its Early, Middle, & Recent Phases

Brian Strachan's Team History



Comments

- **Founded in XXXX**
- **Based in XXXX**



Brian Strachan's Team is Not a Frequent Advertiser

Advertising

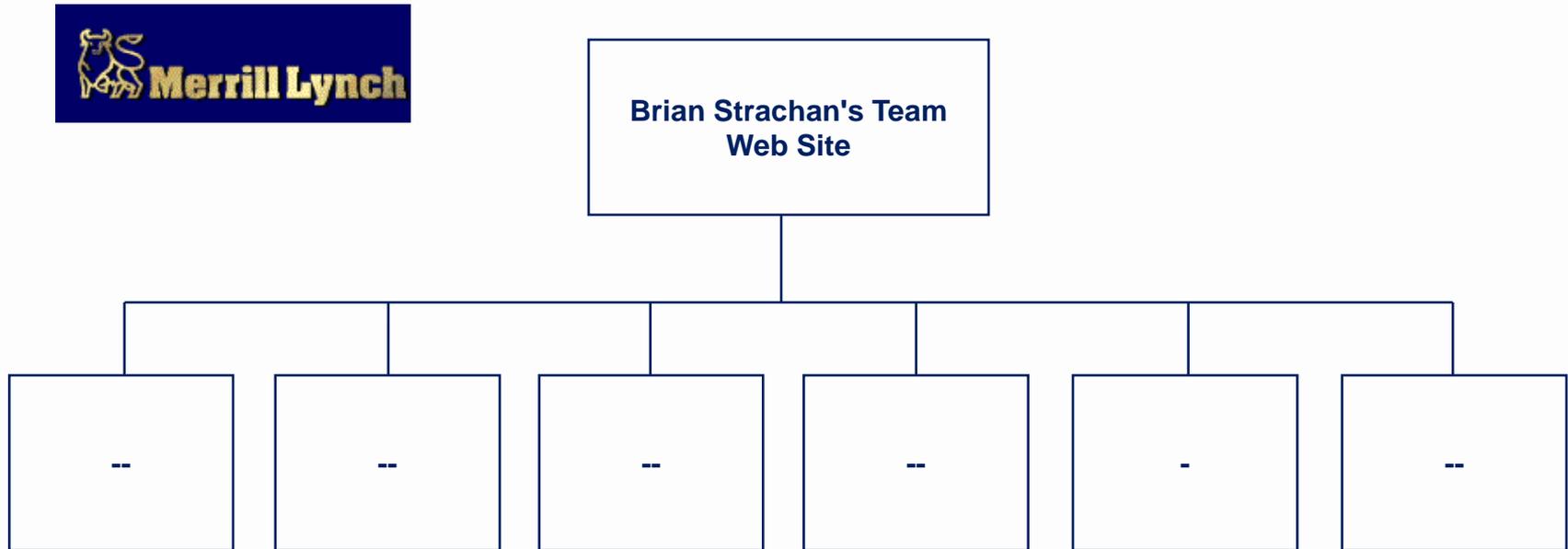
Comments

- --



Brian Strachan's Team Has a Web Site with XXXX Core Sections, Including

Brian Strachan's Team Web Site



Brian Strachan's Team Has a Charitable Giving Program

Charitable
Giving

Comments

- --



Brian Strachan's Team is Not a Frequent Acquirer

Acquisitions

Comments

- --



Brian Strachan's Team Employees



2017

2018

Needs data

Brian Strachan's Team Clients



2017

2018

Brian Strachan's Team Has Gathered Accounts

Needs data

Brian Strachan's Team Accounts



2017

2018

Brian Strachan's Team Has an \$___ Average Account Size

Needs data

Brian Strachan's Team Average Account Size



2017 2018

Brian Strachan's Team Has Gathered Assets Under Administration

Needs data

Brian Strachan's Team Assets Under Administration (\$ Millions)



2017 2018

Brian Strachan's Team Generates Revenues

Needs data

Brian Strachan's Team Revenues (\$ Millions)



2017

2018

Brian Strachan's Team Earns \$___ Million

Needs data

Brian Strachan's Team Net Profits (\$ Millions)



2017

2018

Brian Strachan's Team's First Service is ____

Comments

- --



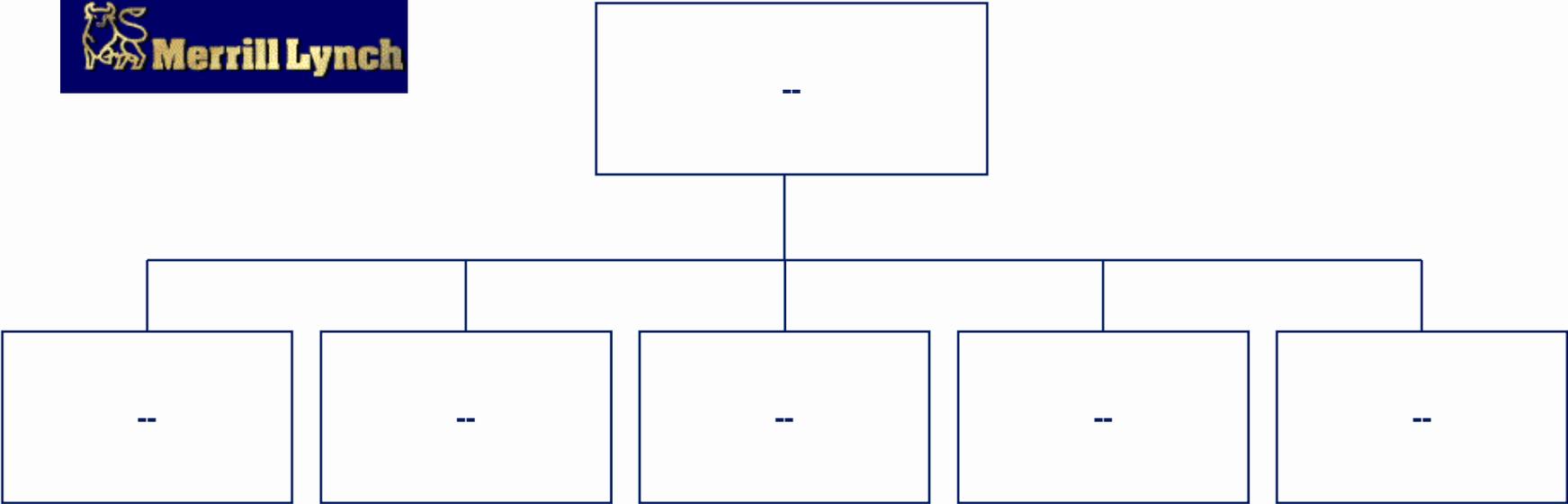
Brian Strachan's Team's Second Service is ____

Comments

- --



Brian Strachan's Team Organizational Chart



Brian Strachan's Team Has a Board of Directors Led by its Chairman...

Brian Strachan's Team Board of Directors

| | | | | |
|------|------|------|------|---|
| -- | -- | -- | -- | -- |
| • -- | • -- | • -- | • -- | • -- |
| | | | |  |

Brian Strachan's Team is Privately Owned

Comments

- --



Brian Strachan's Team Has Assets

Needs data

Brian Strachan's Team Assets (\$ Millions)



2017 2018

Brian Strachan's Team Has Liabilities

Needs data

Brian Strachan's Team Liabilities (\$ Millions)



2017 2018

Brian Strachan's Team Has Shareholders' Equity

Needs data

Brian Strachan's Team Shareholders Equity (\$ Millions)



2017 2018

Source: Tiburon Research & Analysis

Brian Strachan's Team Earns ... Per Share

Needs data

Brian Strachan's Team Earnings Per Share



2017

2018

Brian Strachan's Team Declares ... Dividends Per Share

Needs data

Brian Strachan's Team Dividends Per Share



2017

2018

Needs data

Brian Strachan's Team Dividend Yield



2017 2018

Brian Strachan's Team's Stock Price is ...

Needs data

Brian Strachan's Team Stock Price



2017

2018

Brian Strachan's Team Has ... Shares Outstanding

Needs data

Brian Strachan's Team Shares Outstanding



2017 2018

Brian Strachan's Team's Market Capitalization is ...

Needs data

Brian Strachan's Team Market Capitalization (\$ Millions)



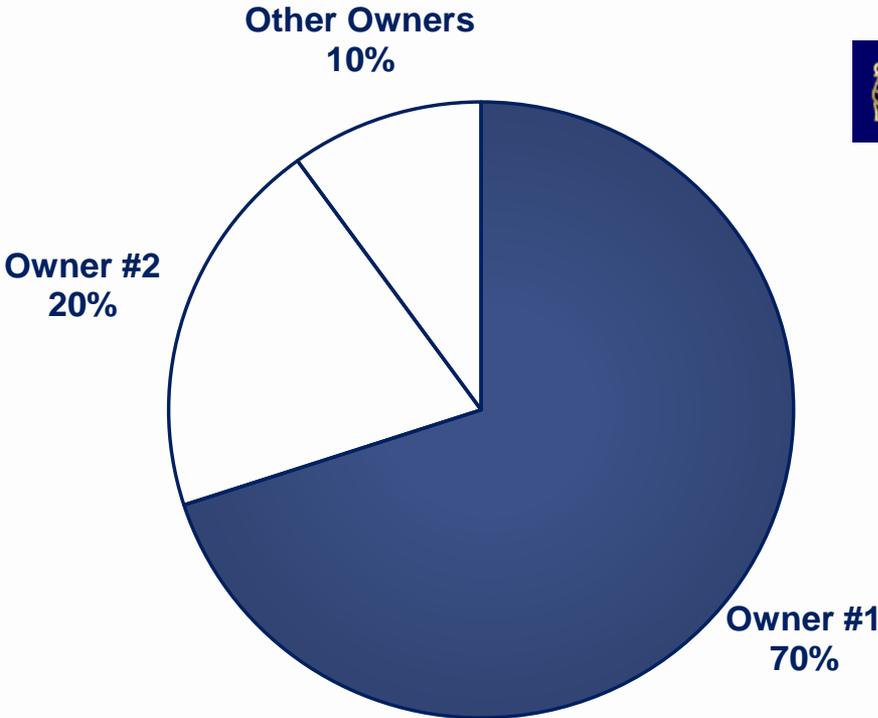
2017 2018

Source: Tiburon Research & Analysis

Brian Strachan's Team is Owned by

Needs data

Brian Strachan's Team Ownership By Owner



Source: Tiburon Research & Analysis

Brian Strachan's Team's Stock Volume is....

Needs data

Brian Strachan's Team Stock Volume



2017

2018



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