

Brian Strachan's Team

A Leading Broker at Merrill
Lynch

Tiburon Written Research
January 13, 2019



TIBURON STRATEGIC ADVISORS

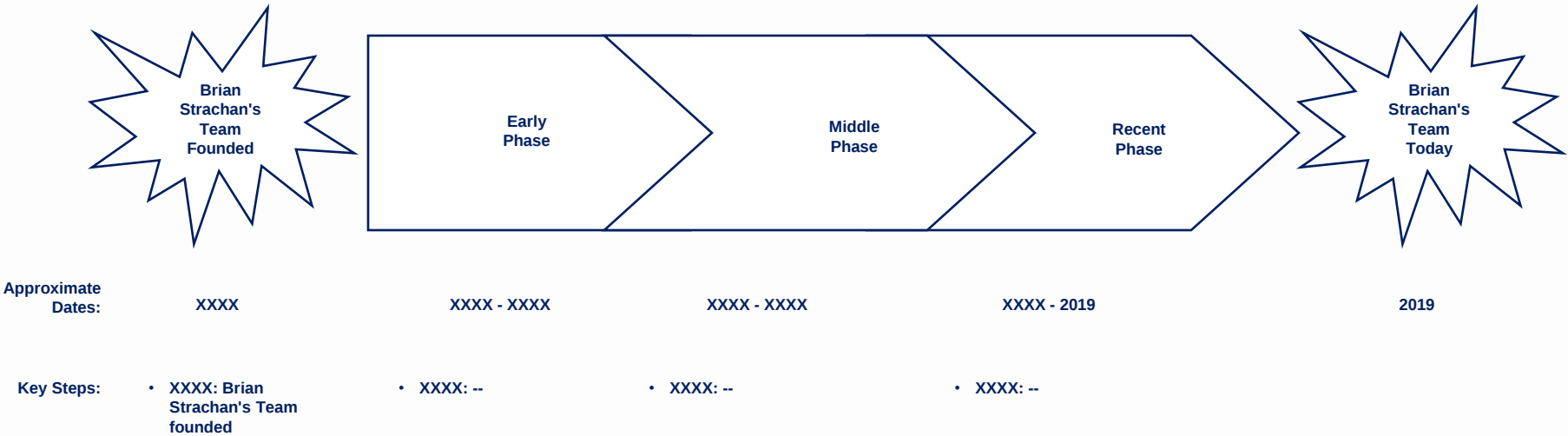
Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (and Related WealthTech) Firms



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

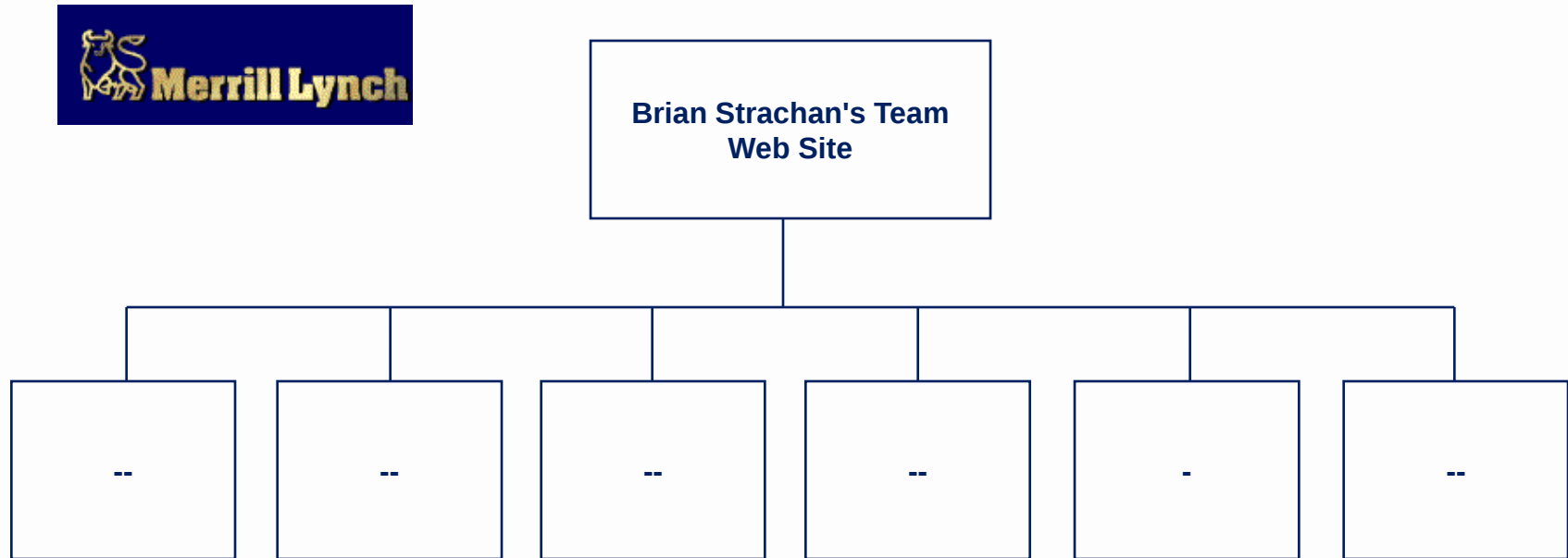


Comments
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Source: Tiburon Research & Analysis

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



Comments
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Source: Tiburon Research & Analysis

Brian Strachan's Team is Not a Frequent Acquirer



Comments	
•	--

Source: Tiburon Research & Analysis

Brian Strachan's Team Employees



2017

2018

**Brian Strachan's Team
Clients**



**Brian Strachan's Team
Accounts**



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

**Brian Strachan's Team
Average Account Size**



Source: Tiburon Research & Analysis

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



Source: Tiburon Research & Analysis

**Brian Strachan's Team
Revenues
(\$ Millions)**



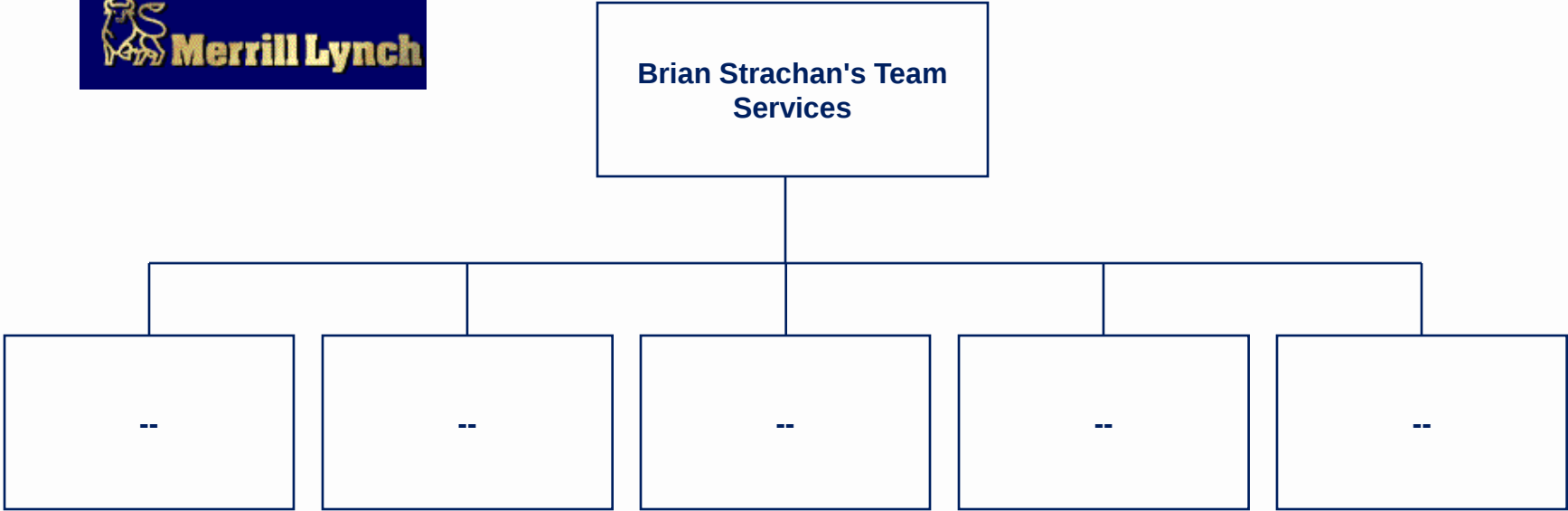
Brian Strachan's Team Earns \$___ Million

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



Source: Tiburon Research & Analysis

**Brian Strachan's Team
Services**



Brian Strachan's Team's First Service is ____



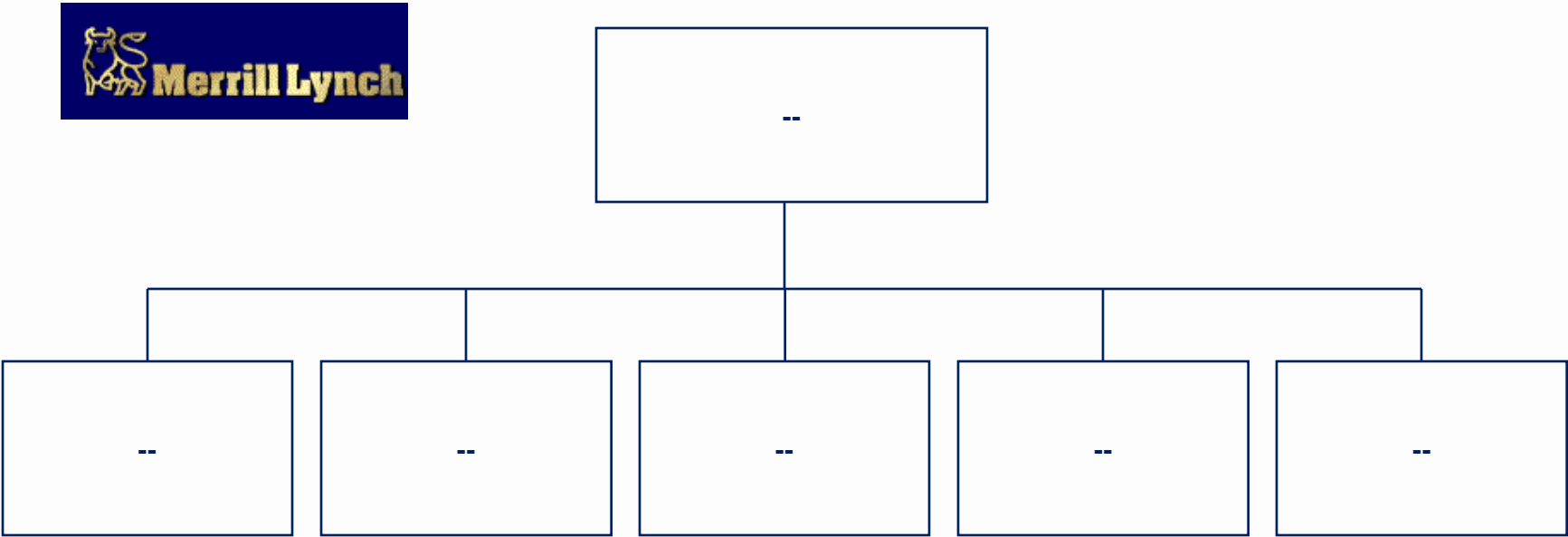
Comments
--

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**

--	--	--	--	--
• --	• --	• --	• --	• -- 

Source: Tiburon Research & Analysis



Comments	
•	--

**Brian Strachan's Team
Assets
(\$ Millions)**



**Brian Strachan's Team
Liabilities
(\$ Millions)**



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



Source: Tiburon Research & Analysis

Brian Strachan's Team Earns ... Per Share

**Brian Strachan's Team
Earnings Per Share**



Source: Tiburon Research & Analysis

**Brian Strachan's Team
Dividends Per Share**



**Brian Strachan's Team
Dividend Yield**



Source: Tiburon Research & Analysis

**Brian Strachan's Team
Stock Price**



Brian Strachan's Team Has ... Shares Outstanding

Brian Strachan's Team Shares Outstanding



2017

2018

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

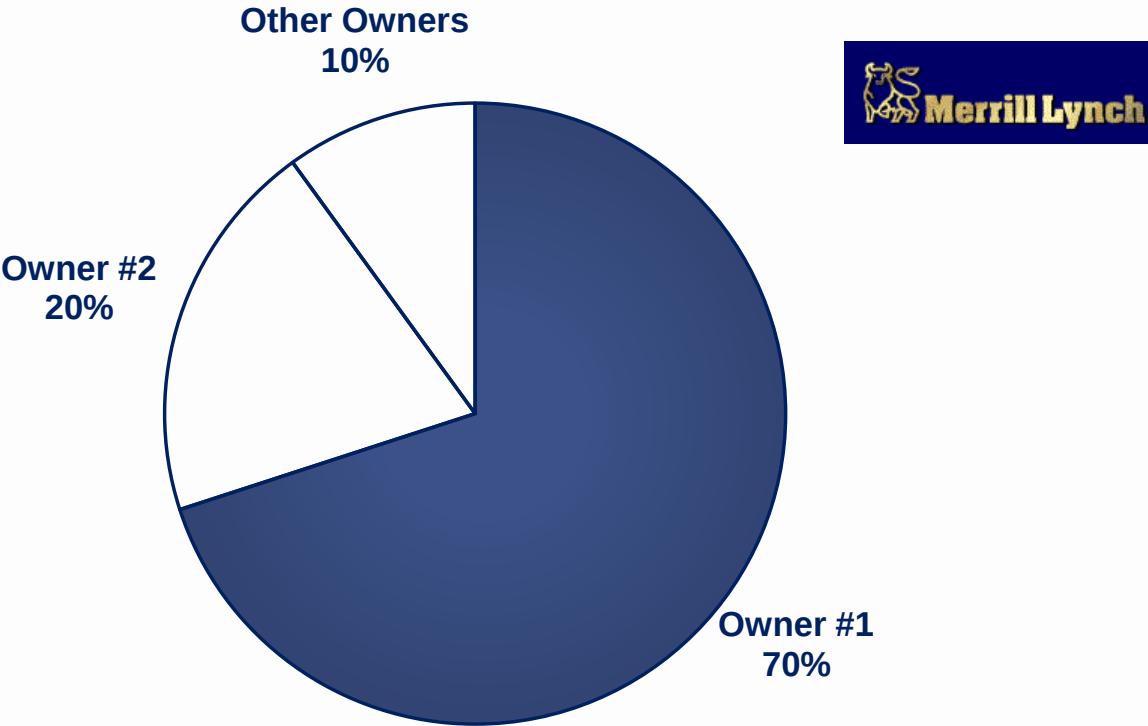
Brian Strachan's Team Market Capitalization (\$ Millions)



2017

2018

**Brian Strachan's Team
Ownership
By Owner**



Source: Tiburon Research & Analysis

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

**Brian Strachan's Team
Stock Volume**





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