

Dana Lochniskar's Team

A Leading Broker at Merrill
Lynch

Tiburon Written Research
December 22, 2018



TIBURON STRATEGIC ADVISORS

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

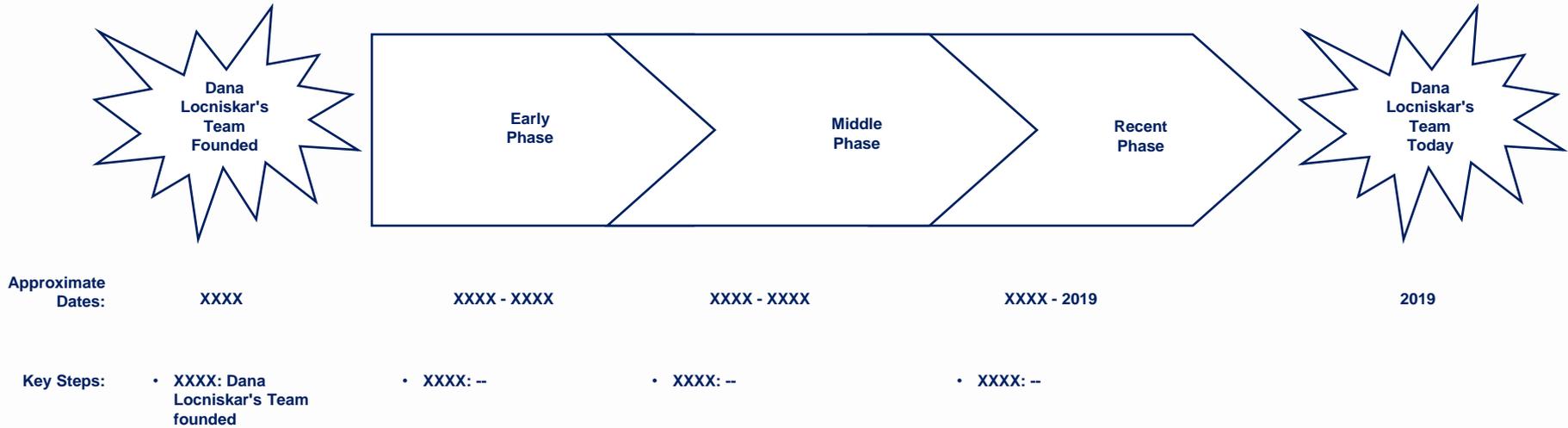
Comments

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



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

Dana Locniskar's Team History



Dana Locniskar's Team was Founded in XXXX

Comments

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



Dana Lochniskar's Team is Not a Frequent Advertiser

Advertising

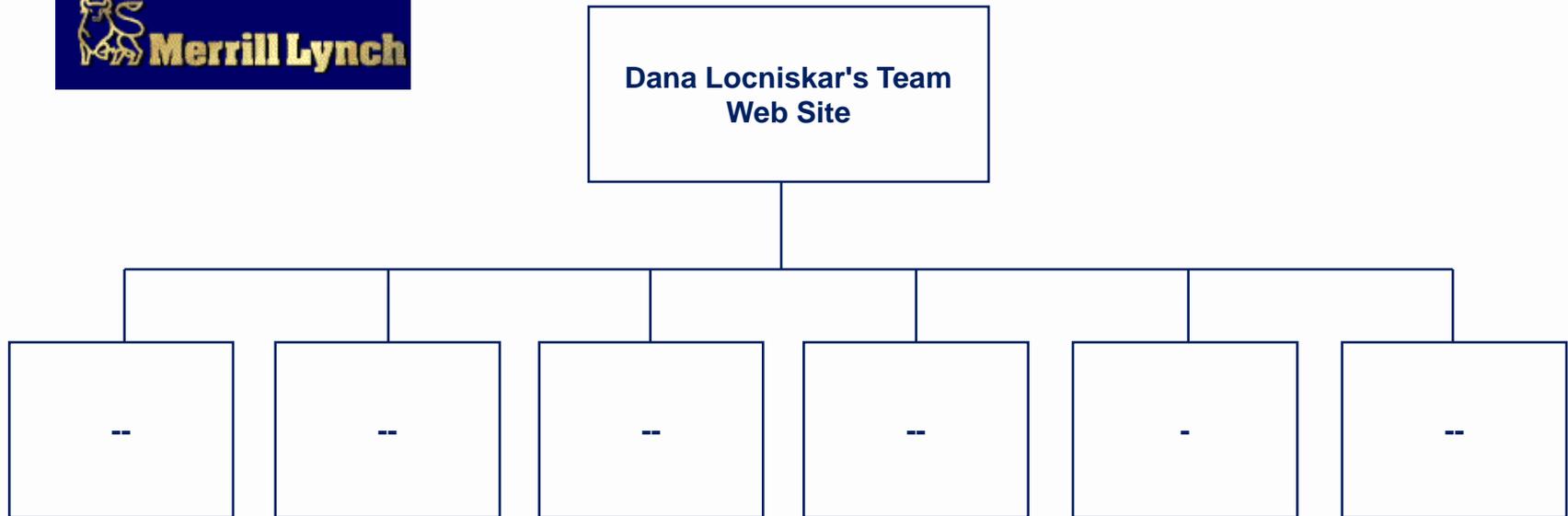
Comments

- --



Dana Locniskar's Team Has a Web Site with XXXX Core Sections, Including

Dana Locniskar's Team Web Site



Dana Lochniskar's Team Has a Charitable Giving Program

Charitable
Giving

Comments

- --



Dana Lochniskar's Team is Not a Frequent Acquirer

Acquisitions

Comments

- --



Dana Lochniskar's Team Has Employees

Dana Lochniskar's Team Employees



2017

2018

Needs data

Dana Lochniskar's Team Clients



2017

2018

Dana Lochniskar's Team Has Gathered Accounts

Needs data

Dana Lochniskar's Team Accounts



2017

2018

Dana Lochniskar's Team Has an \$___ Average Account Size

Needs data

Dana Lochniskar's Team Average Account Size



2017

2018

Dana Lochniskar's Team Has Gathered Assets Under Administration

Needs data

Dana Lochniskar's Team Assets Under Administration (\$ Millions)



2017

2018

Dana Lochniskar's Team Generates Revenues

Needs data

Dana Lochniskar's Team Revenues (\$ Millions)



2017

2018

Dana Lochniskar's Team Earns \$___ Million

Needs data

Dana Lochniskar's Team Net Profits (\$ Millions)

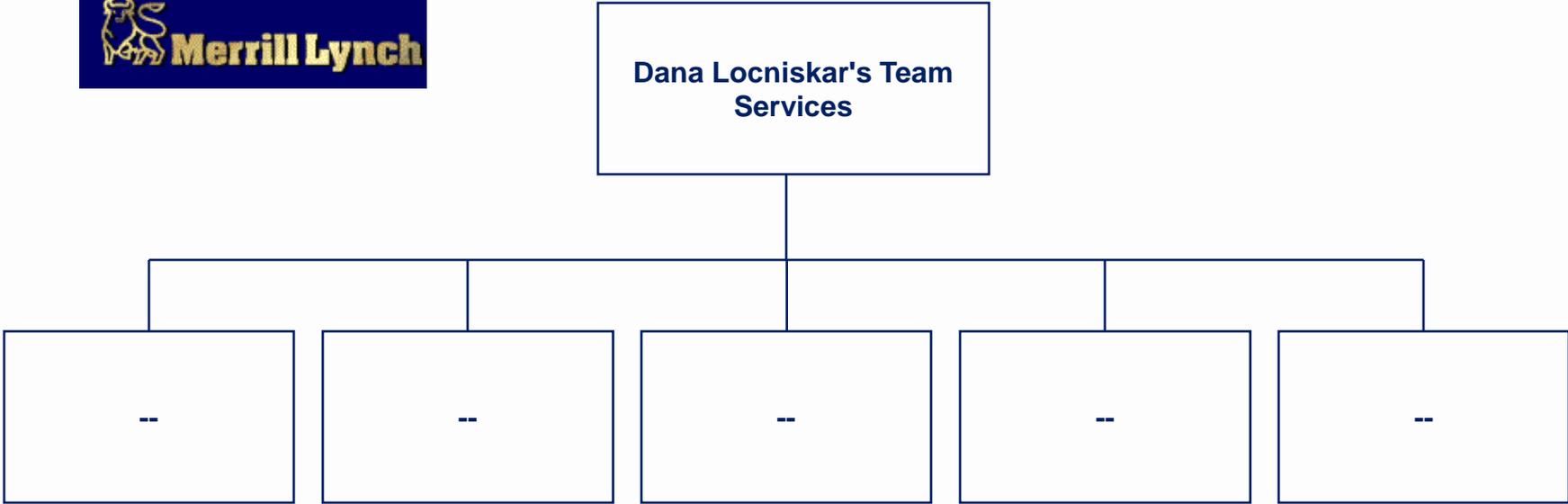


2017

2018

Dana Lochniskar's Team Provides a Number of Services, Including...

Dana Lochniskar's Team Services



Source: Tiburon Research & Analysis

Dana Lochniskar's Team's First Service is ____

Comments

- --



Dana Lochniskar's Team's Second Service is ____

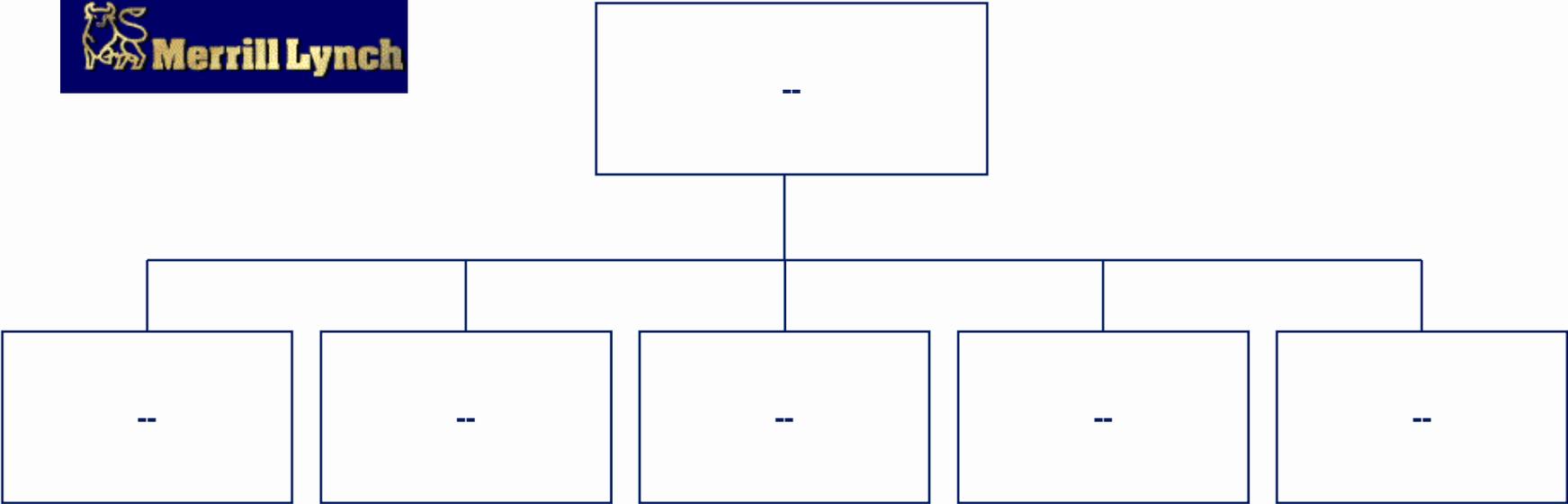
Comments

- --



Dana Locniskar's Team is Led by ...

Dana Locniskar's Team Organizational Chart



Source: Tiburon Research & Analysis

Dana Lochniskar's Team Has a Board of Directors Led by its Chairman...

Dana Lochniskar's Team Board of Directors

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

Comments

- --



Dana Lochniskar's Team Has Assets

Needs data

Dana Lochniskar's Team Assets (\$ Millions)



2017 2018

Dana Lochniskar's Team Has Liabilities

Needs data

Dana Lochniskar's Team Liabilities (\$ Millions)



2017 2018

Dana Lochniskar's Team Has Shareholders' Equity

Needs data

Dana Lochniskar's Team Shareholders Equity (\$ Millions)



2017 2018

Source: Tiburon Research & Analysis

Dana Lochniskar's Team Earns ... Per Share

Needs data

Dana Lochniskar's Team Earnings Per Share



2017

2018

Dana Lochniskar's Team Declares ... Dividends Per Share

Needs data

Dana Lochniskar's Team Dividends Per Share



2017 2018

Dana Lochniskar's Team Has a ... Dividend Yield

Needs data

Dana Lochniskar's Team Dividend Yield



2017 2018

Dana Lochniskar's Team's Stock Price is ...

Needs data

Dana Lochniskar's Team Stock Price



2017 2018

Dana Lochniskar's Team Has ... Shares Outstanding

Needs data

Dana Lochniskar's Team Shares Outstanding



2017

2018

Dana Lochniskar's Team's Market Capitalization is ...

Needs data

Dana Lochniskar's Team Market Capitalization (\$ Millions)



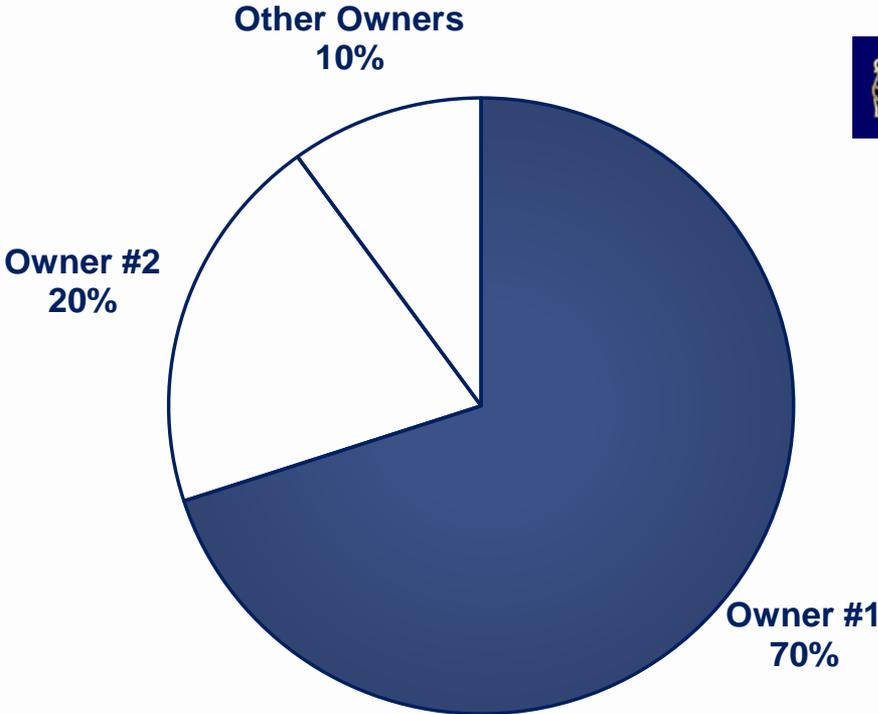
2017 2018

Source: Tiburon Research & Analysis

Dana Lochniskar's Team is Owned by

Needs data

Dana Lochniskar's Team Ownership By Owner



Source: Tiburon Research & Analysis

Dana Lochniskar's Team's Stock Volume is....

Needs data

Dana Lochniskar's Team Stock Volume



2017 2018



TIBURON STRATEGIC ADVISORS

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