

Dana Locniskar's Team

A Leading Broker at Merrill Lynch

Tiburon Written Research
December 22, 2018



TIBURON STRATEGIC ADVISORS

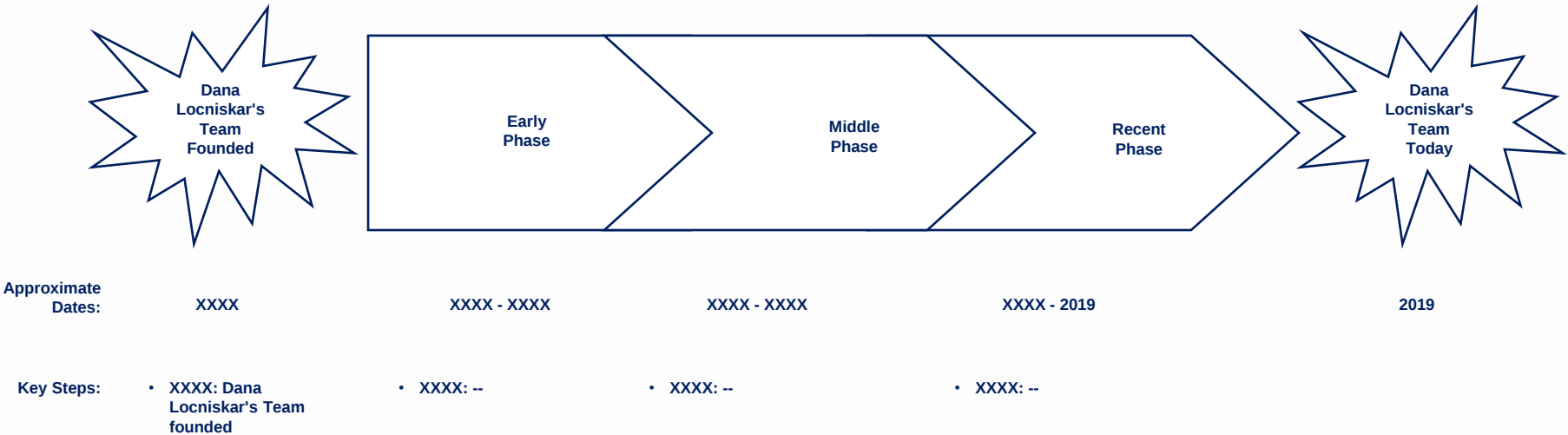
Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (and Related WealthTech) Firms



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



Source: Tiburon Research & Analysis

Dana Locniskar's Team was Founded in XXXX



Comments
• Founded in XXXX • Based in XXXX

Source: Tiburon Research & Analysis

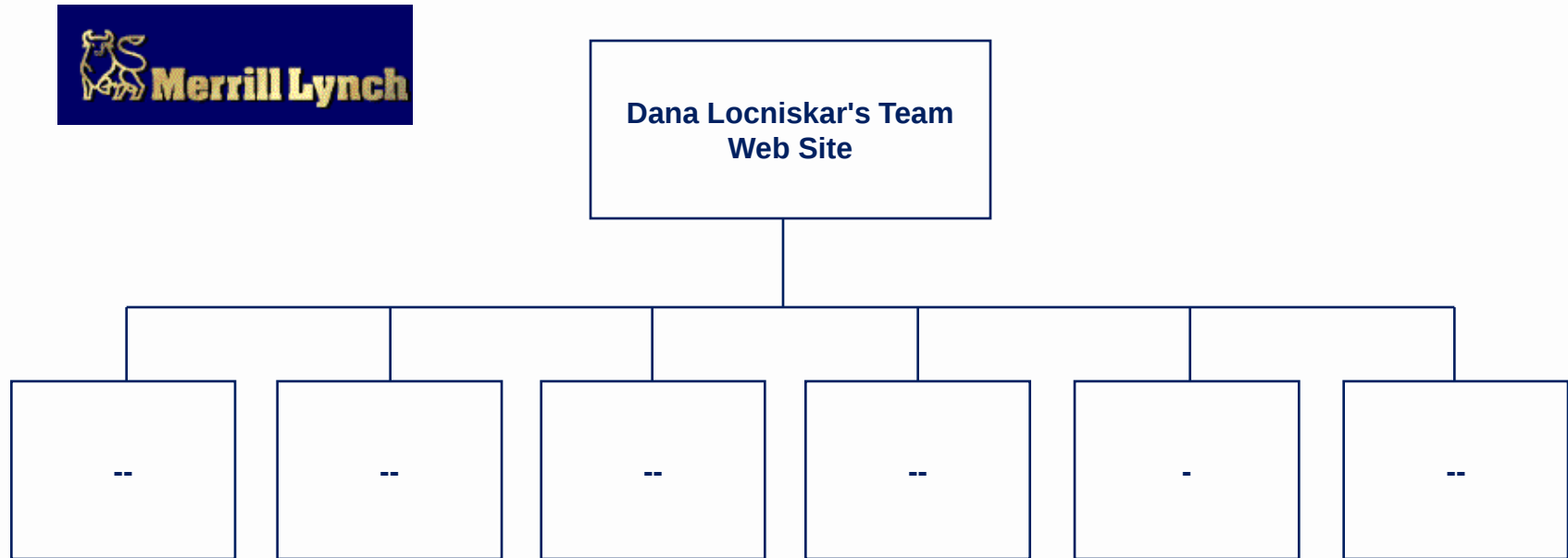
Comments

- --



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

Dana Locniskar's Team Web Site



Dana Locniskar's Team Has a Charitable Giving Program



Comments
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Source: Tiburon Research & Analysis

Dana Locniskar's Team is Not a Frequent Acquirer



Comments
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Source: Tiburon Research & Analysis

Dana Locniskar's Team Employees



2017

2018

**Dana Locniskar's Team
Clients**



Dana Locniskar's Team Accounts



2017

2018

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

Dana Locniskar's Team Average Account Size



2017

2018

Dana Locniskar's Team Has Gathered Assets Under Administration

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



	2017	2018

**Dana Locniskar's Team
Revenues
(\$ Millions)**



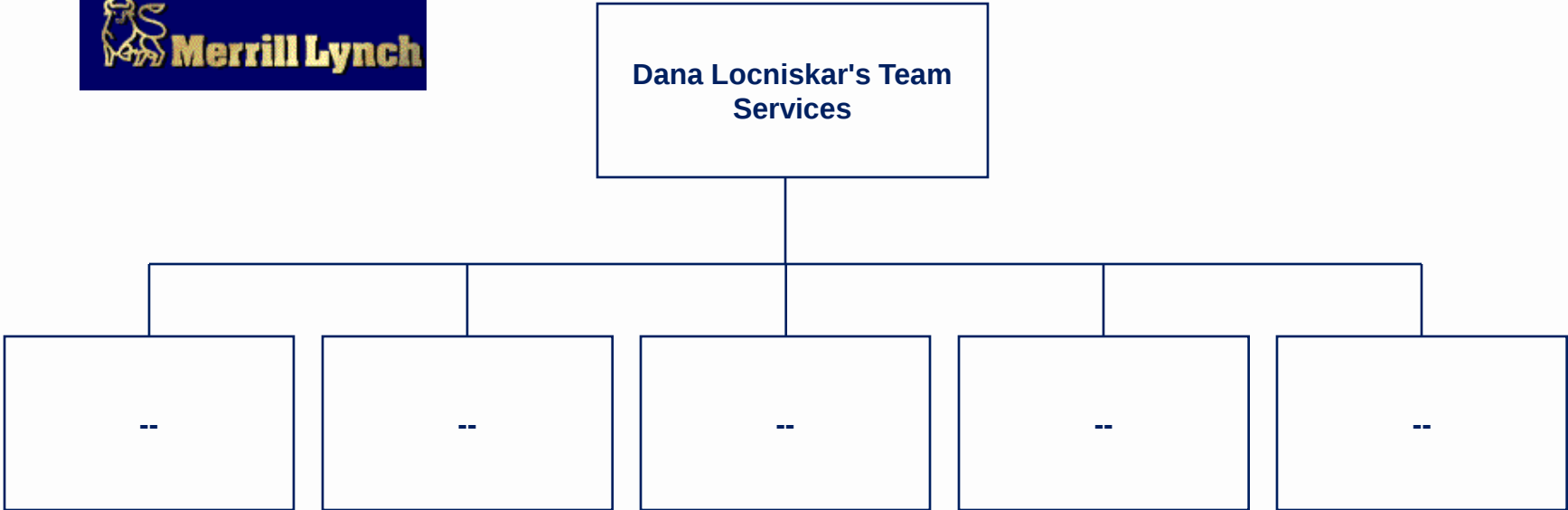
Dana Locniskar's Team Earns \$___ Million

**Dana Locniskar's Team
Net Profits
(\$ Millions)**



Source: Tiburon Research & Analysis

**Dana Locniskar's Team
Services**



Dana Locniskar's Team's First Service is ____



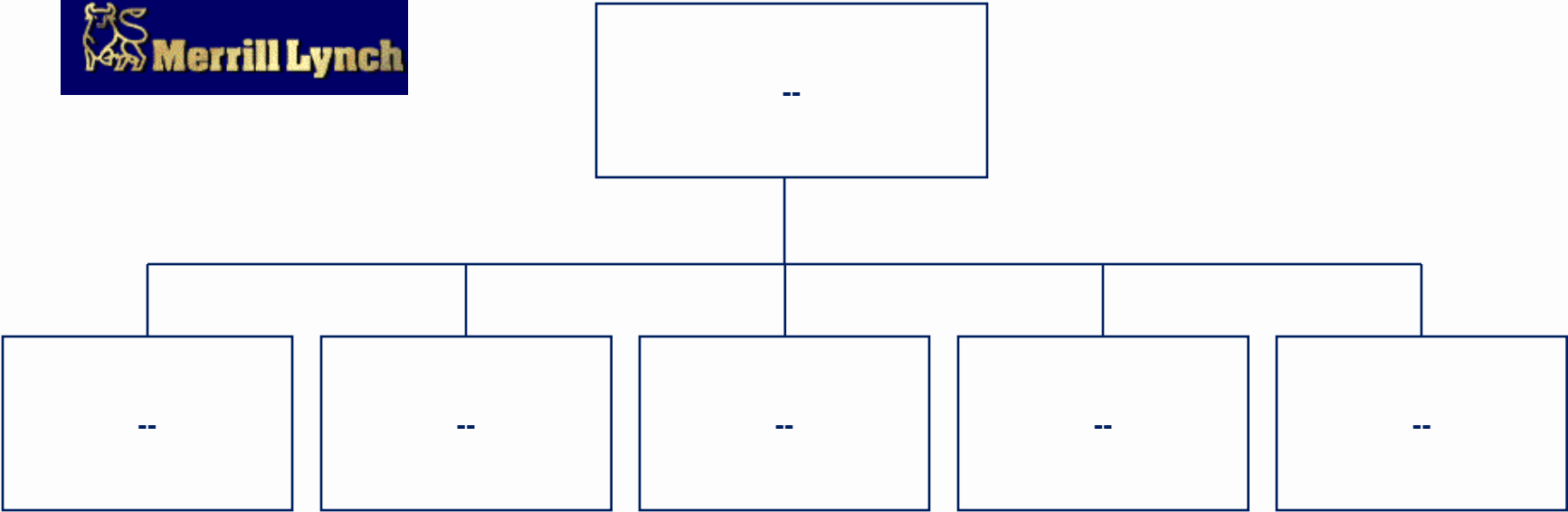
Comments
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Dana Locniskar's Team's Second Service is ____



Comments
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**Dana Locniskar's Team
Organizational Chart**



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

**Dana Locniskar's Team
Board of Directors**

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

Source: Tiburon Research & Analysis



Comments	
•	--

**Dana Locniskar's Team
Assets
(\$ Millions)**



**Dana Locniskar's Team
Liabilities
(\$ Millions)**



Dana Locniskar's Team Has Shareholders' Equity

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



Source: Tiburon Research & Analysis

Dana Locniskar's Team Earns ... Per Share

Dana Locniskar's Team Earnings Per Share



2017

2018

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

Dana Locniskar's Team Dividends Per Share



Source: Tiburon Research & Analysis

**Dana Locniskar's Team
Dividend Yield**



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

Dana Locniskar's Team Stock Price



Source: Tiburon Research & Analysis

Dana Locniskar's Team Has ... Shares Outstanding

**Dana Locniskar's Team
Shares Outstanding**

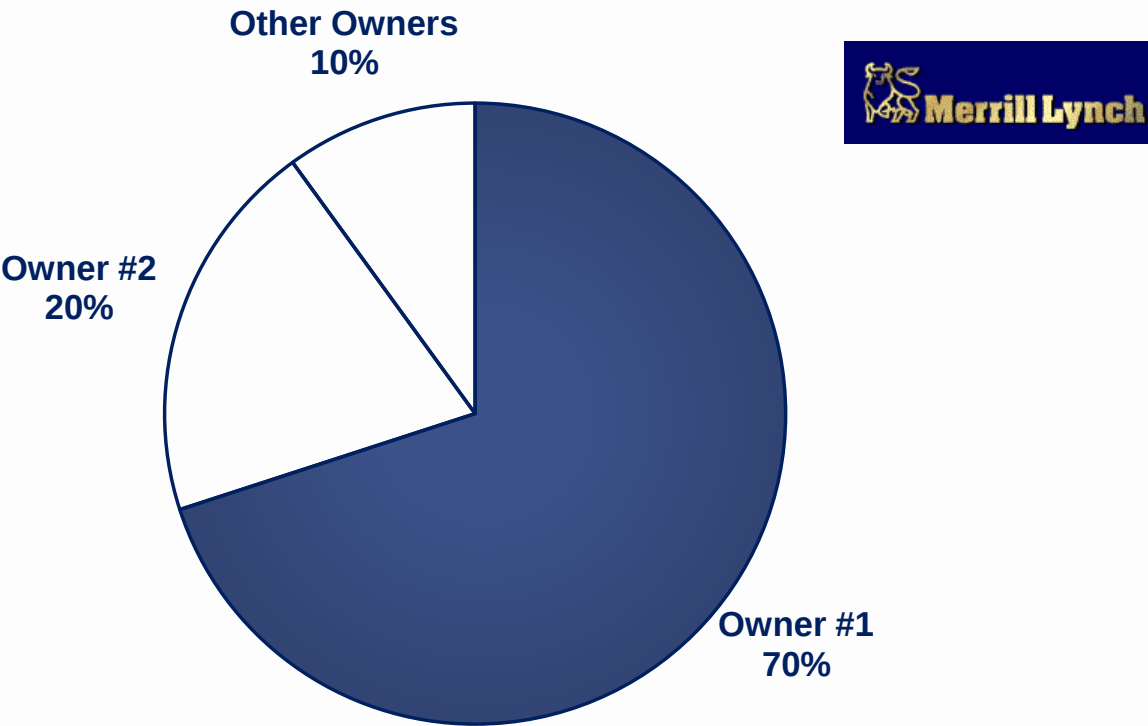


Dana Locniskar's Team Market Capitalization (\$ Millions)



2017 **2018**

**Dana Locniskar's Team
Ownership
By Owner**



Source: Tiburon Research & Analysis

**Dana Locniskar's Team
Stock Volume**





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