

Dean Trindle's Team

A Leading Bank Broker

Tiburon Written Research
January 18, 2019



TIBURON STRATEGIC ADVISORS

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

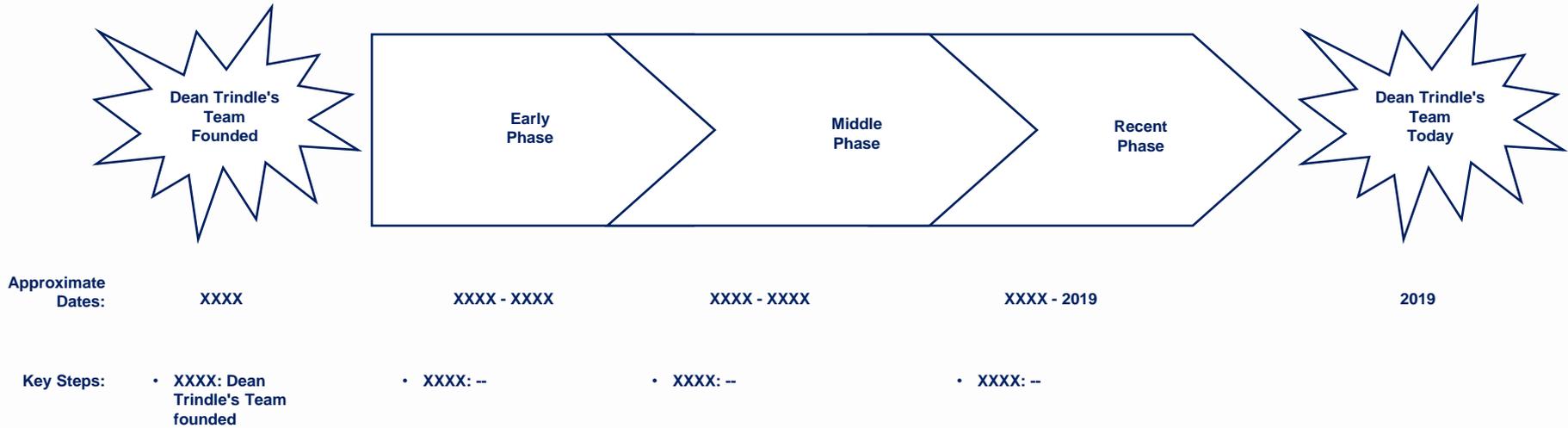
Morgan Stanley

Comments

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

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

Dean Trindle's Team History



Dean Trindle's Team was Founded in XXXX

Morgan Stanley

Comments

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

Dean Trindle's Team is Not a Frequent Advertiser

Advertising

Comments

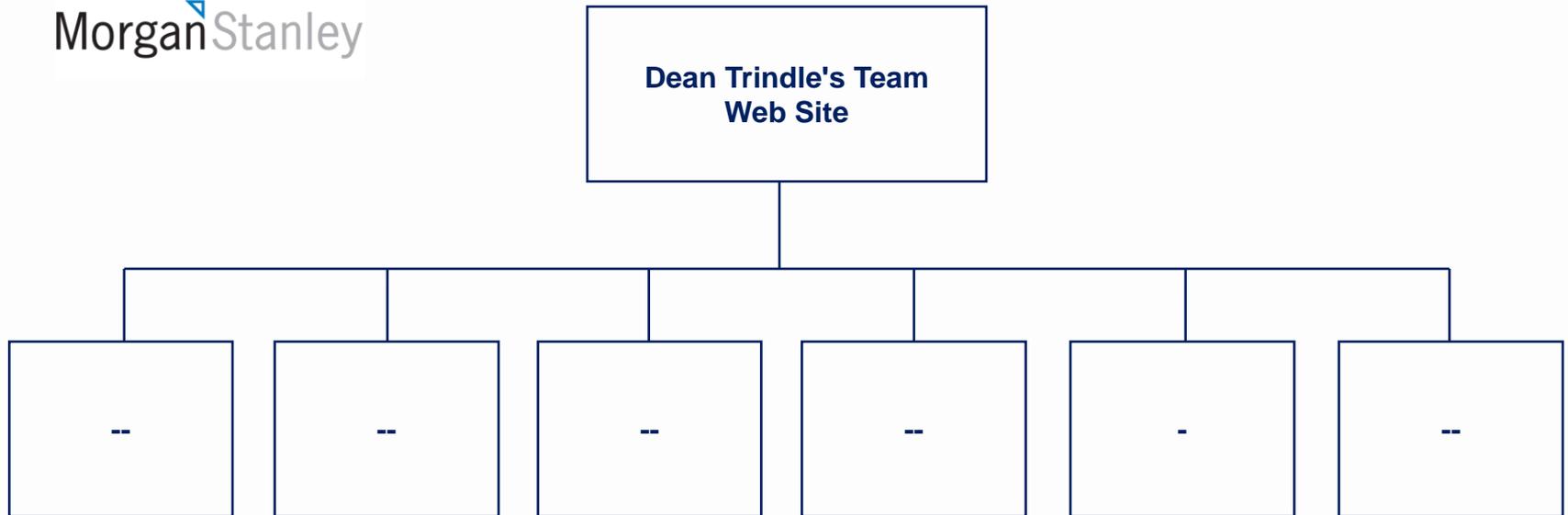
- --

Morgan Stanley

Dean Trindle's Team Has a Web Site with XXXX Core Sections, Including

Dean Trindle's Team Web Site

Morgan Stanley



Dean Trindle's Team Has a Charitable Giving Program

Charitable
Giving

Comments

- --

Morgan Stanley

Dean Trindle's Team is Not a Frequent Acquirer

Acquisitions

Comments

- --

Morgan Stanley

**Dean Trindle's Team
Employees**

Morgan Stanley



Source: Tiburon Research & Analysis

Needs data

Dean Trindle's Team Clients

Morgan Stanley

2017

2018

Dean Trindle's Team Has Gathered Accounts

Needs data

Dean Trindle's Team Accounts

Morgan Stanley

2017

2018

Dean Trindle's Team Has an \$___ Average Account Size

Needs data

Dean Trindle's Team Average Account Size

Morgan Stanley

2017 2018

Dean Trindle's Team Has Gathered Assets Under Administration

Needs data

Dean Trindle's Team Assets Under Administration (\$ Millions)

Morgan Stanley

2017 2018

Dean Trindle's Team Generates Revenues

Needs data

Dean Trindle's Team Revenues (\$ Millions)

Morgan Stanley

2017 2018

Dean Trindle's Team Earns \$___ Million

Needs data

Dean Trindle's Team Net Profits (\$ Millions)

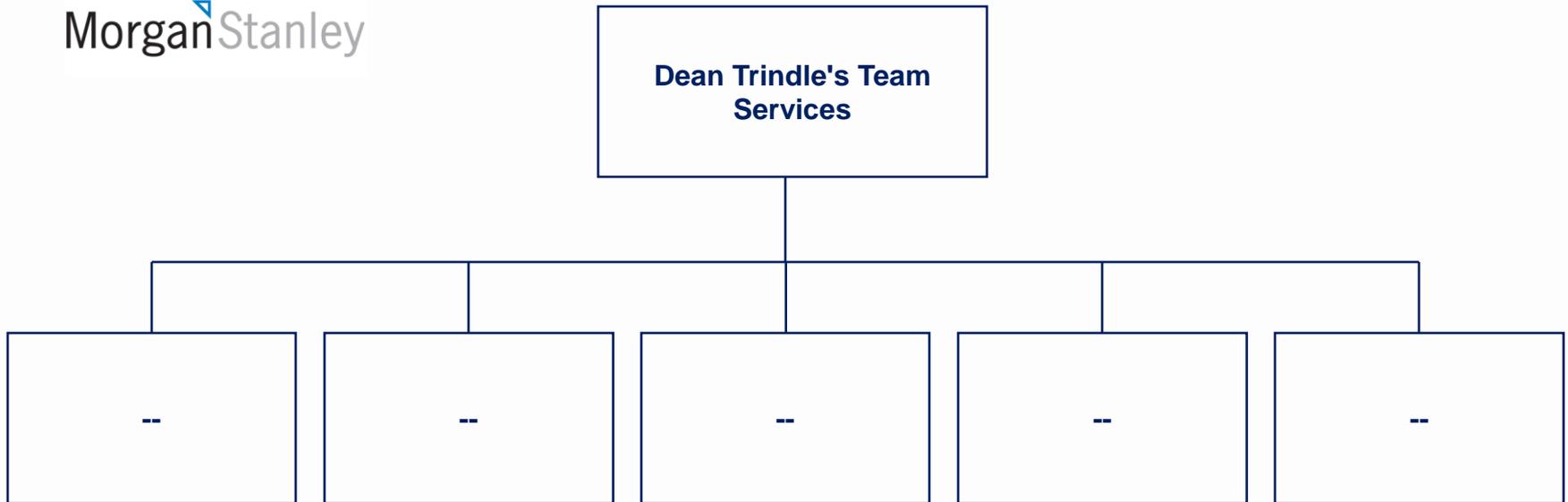


2017 2018

Dean Trindle's Team Provides a Number of Services, Including...

Dean Trindle's Team Services

Morgan Stanley



Dean Trindle's Team's First Service is ____

Comments
<ul style="list-style-type: none">• --

- --



Dean Trindle's Team's Second Service is ____

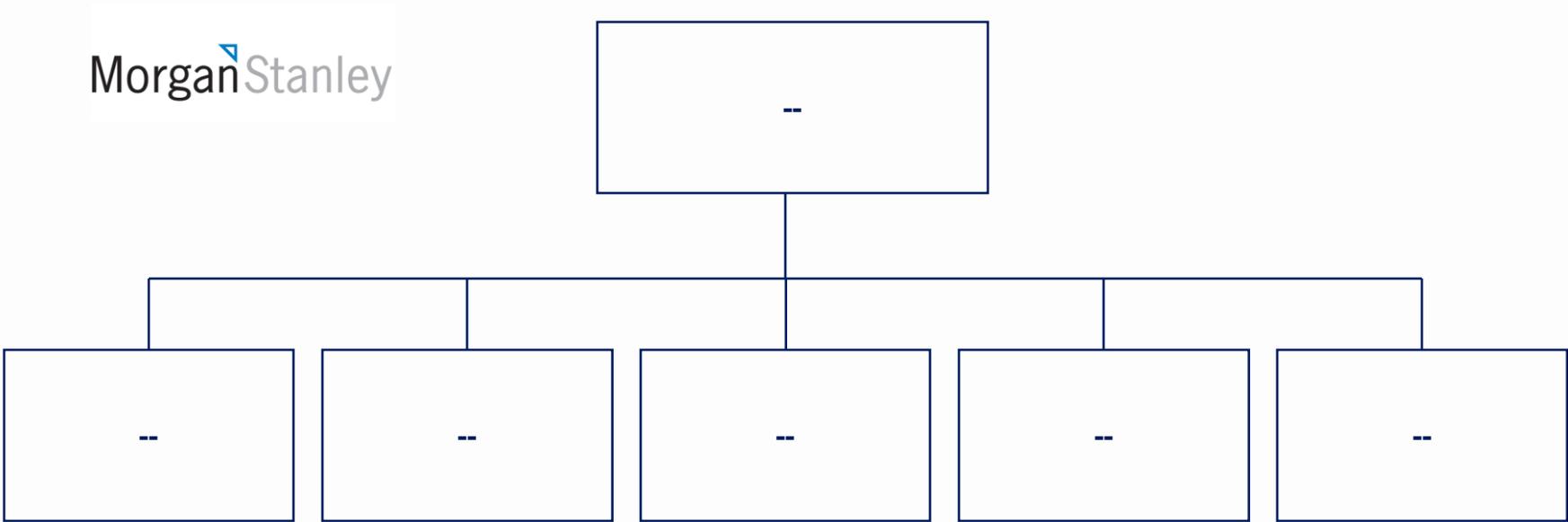
Comments

- --



Dean Trindle's Team is Led by ...

Dean Trindle's Team Organizational Chart



Dean Trindle's Team Has a Board of Directors Led by its Chairman...

Dean Trindle's Team Board of Directors

--	--	--	--	--
• --	• --	• --	• --	• --
				Morgan Stanley

Dean Trindle's Team is Privately Owned

Morgan Stanley

Comments

- --

Dean Trindle's Team Has Assets

Needs data

Dean Trindle's Team Assets (\$ Millions)

Morgan Stanley

2017

2018

Dean Trindle's Team Has Liabilities

Needs data

Dean Trindle's Team Liabilities (\$ Millions)

Morgan Stanley

2017

2018

Dean Trindle's Team Has Shareholders' Equity

Needs data

Dean Trindle's Team Shareholders Equity (\$ Millions)

Morgan Stanley

2017 2018

Source: Tiburon Research & Analysis

Dean Trindle's Team Earns ... Per Share

Needs data

Dean Trindle's Team Earnings Per Share

Morgan Stanley

2017 2018

Source: Tiburon Research & Analysis

Dean Trindle's Team Declares ... Dividends Per Share

Needs data

Dean Trindle's Team Dividends Per Share

Morgan Stanley

2017 2018

Source: Tiburon Research & Analysis

Dean Trindle's Team Has a ... Dividend Yield

Needs data

Dean Trindle's Team Dividend Yield

Morgan Stanley

2017

2018

Dean Trindle's Team's Stock Price is ...

Needs data

Dean Trindle's Team Stock Price

Morgan Stanley

2017 2018

Source: Tiburon Research & Analysis

Dean Trindle's Team Has ... Shares Outstanding

Needs data

Dean Trindle's Team Shares Outstanding

Morgan Stanley

2017 2018

Dean Trindle's Team's Market Capitalization is ...

Needs data

Dean Trindle's Team Market Capitalization (\$ Millions)

Morgan Stanley

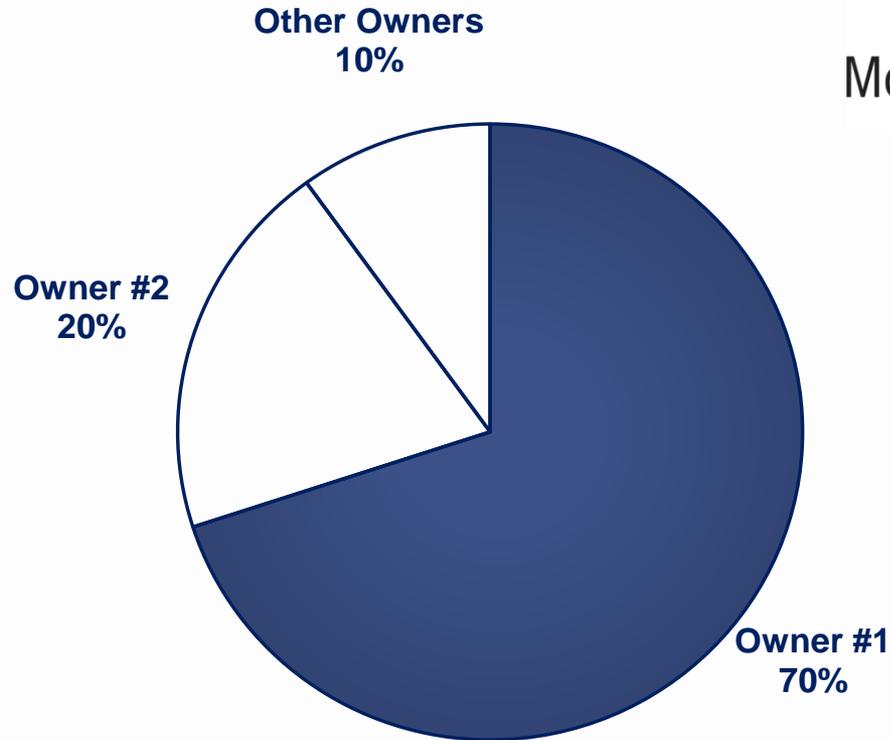
2017 2018

Source: Tiburon Research & Analysis

Dean Trindle's Team is Owned by

Needs data

Dean Trindle's Team Ownership By Owner



Dean Trindle's Team's Stock Volume is....

Needs data

Dean Trindle's Team Stock Volume

Morgan Stanley

2017 2018

Source: Tiburon Research & Analysis



TIBURON STRATEGIC ADVISORS

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