



TIBURON STRATEGIC ADVISORS

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

Financial Institutions Profiles Series

Lion Street: A Life Insurance Producers Group

(Table of Contents)



March 11, 2021

TABLE OF CONTENTS

History.....

- Partners NewCo Phase
- Capital Raising Phase
- Awards Phase

Statistics.....

- Offices
- Employees
- Revenues
- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)
- Net Profits.....

Businesses.....

- Lion Street Independent
- Statistics
- Employees.....
- Owner Firm States.....
- Owner Firm Cities.....
- Owner Firms.....
- Advisor Owners
- Cases
- Premiums
- Target Life Premiums
- Excess Premiums.....
- Revenues
- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)
- Net Profits.....
- Services
- Life Insurance Products
- Multi-Life Insurance Solutions.....

Wealth Management Platform

- Statistics
- Revenues
- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)
- Net Profits.....

Businesses.....

- Lion Street Financial.....
- Statistics
- Employees.....
- Financial Advisors
- Financial Advisors by Gender
- Clients
- Accounts
- Net New Accounts.....
- Assets Under Management & Administration.....
- Net New Assets Under Management & Administration.....
- Revenues

	Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)
	Net Profits.....
Services	
	Variable Life
	Variable Annuities.....
	Managed Account Programs
Lion Street Advisors.....	
Statistics	
	Employees.....
	Clients
	Accounts
	Assets Under Management
	Assets Under Management (By Type)
	Revenues
	Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)
	Net Profits.....
Services	
	Service One.....
	Service Two.....
Corporate & Business Solutions	
Statistics	
	Revenues
	Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)
	Net Profits.....
Services	
	Corporate Owned Life Insurance (COLI)
	Bank-Owned Life Insurance (BOLI)
Private Client Group	
Statistics	
	Revenues
	Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)
	Net Profits.....
Services	
	Service #1
	Service #2
Organization & Ownership.....	
Organizational Structure	
	Organizational Chart
	Executive Committee
	Board of Directors
Ownership	
	Privately Owned
	Assets
	Liabilities
	Shareholders Equity.....
	Earnings Per Share.....
	Dividends Per Share

Dividend Yield
Stock Price
Shares Outstanding
Market Capitalization.....
Ownership by Owner.....
Stock Volume.....