

Perry Chesney's Team:

A Leading Bank Broker

Tiburon Written Research
February 15, 2019



TIBURON STRATEGIC ADVISORS

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

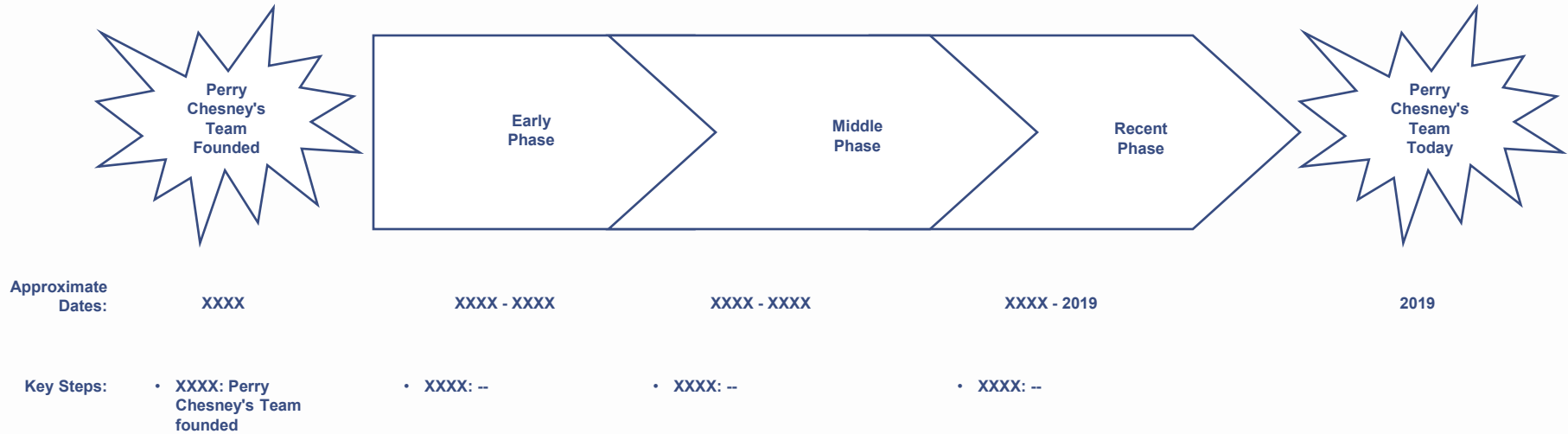


Comments

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

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

Perry Chesney's Team History





Comments

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

Perry Chesney's Team is Not a Frequent Advertiser

Advertising

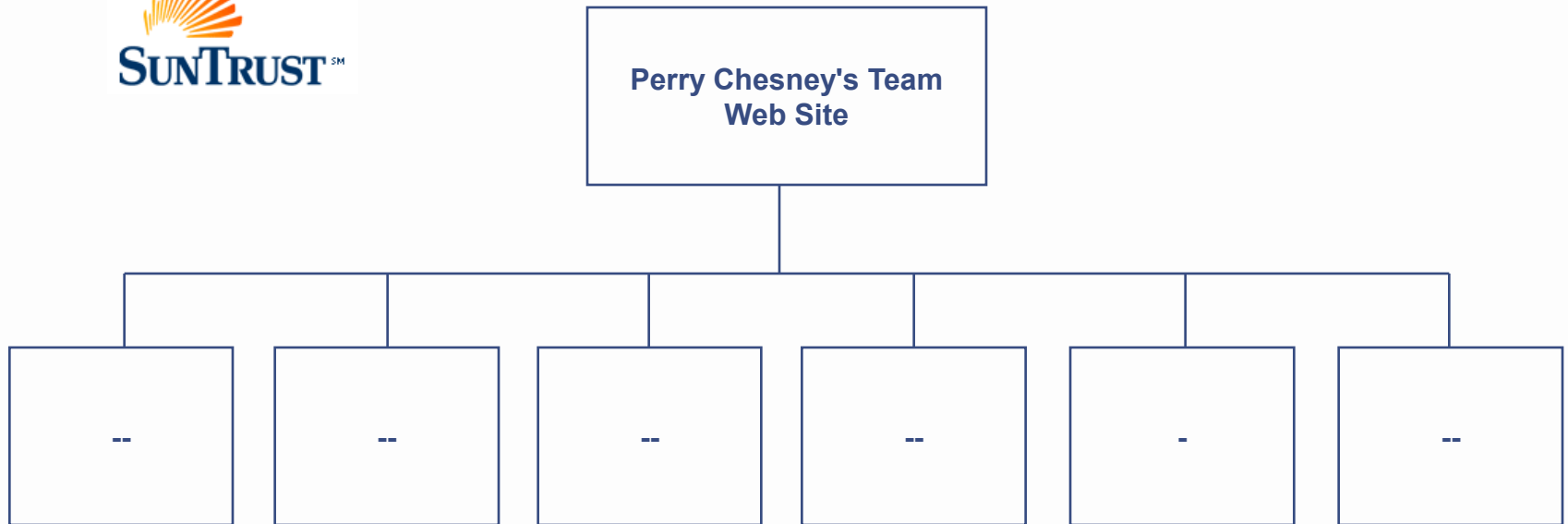
Comments

-



Perry Chesney's Team Has a Web Site with XXXX Core Sections, Including _____

Perry Chesney's Team Web Site



Perry Chesney's Team Has a Charitable Giving Program

Charitable Giving

Comments

- --



Perry Chesney's Team is Not a Frequent Acquirer

Acquisitions

Comments

- --



Perry Chesney's Team Employees



2017

2018

Needs data

Perry Chesney's Team Clients



2017 2018

Perry Chesney's Team Has Gathered Accounts

Needs data

Perry Chesney's Team Accounts



2017 2018

Perry Chesney's Team Has an \$___ Average Account Size

Needs data

Perry Chesney's Team Average Account Size



2017 2018

Perry Chesney's Team Has Gathered Assets Under Administration

Needs data

Perry Chesney's Team Assets Under Administration (\$ Millions)

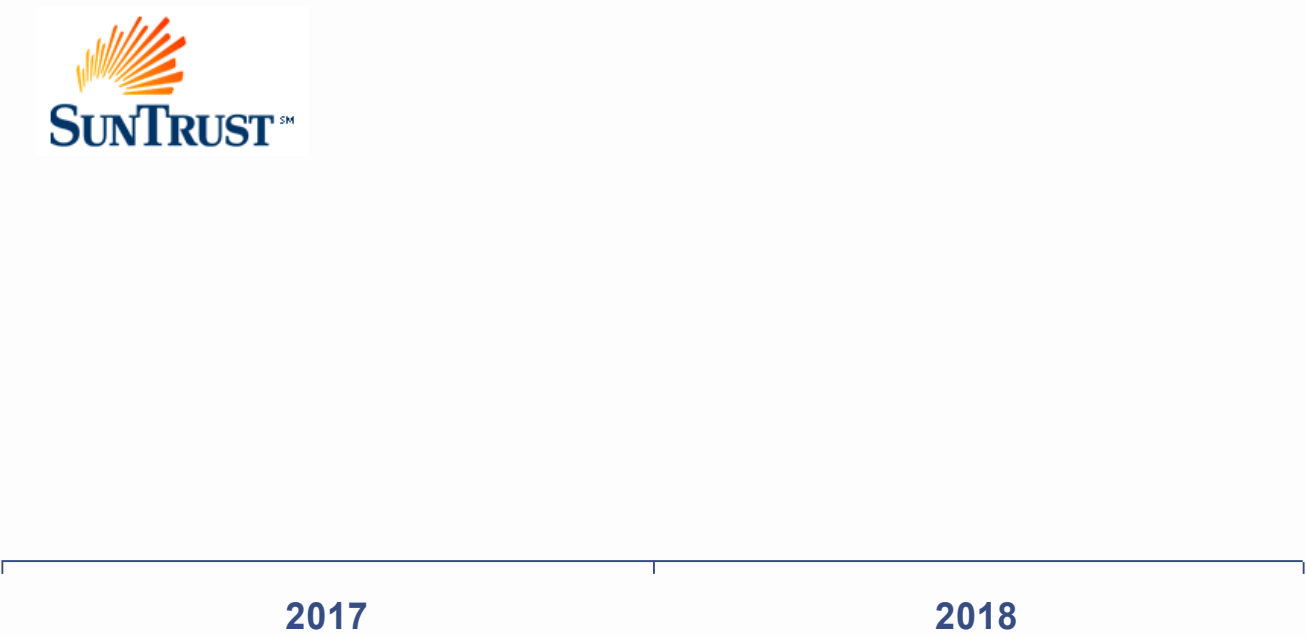


Source: Tiburon Research & Analysis

Perry Chesney's Team Generates Revenues

Needs data

Perry Chesney's Team Revenues (\$ Millions)



Source: Tiburon Research & Analysis

Perry Chesney's Team Earns \$___ Million

Needs data

Perry Chesney's Team Net Profits (\$ Millions)

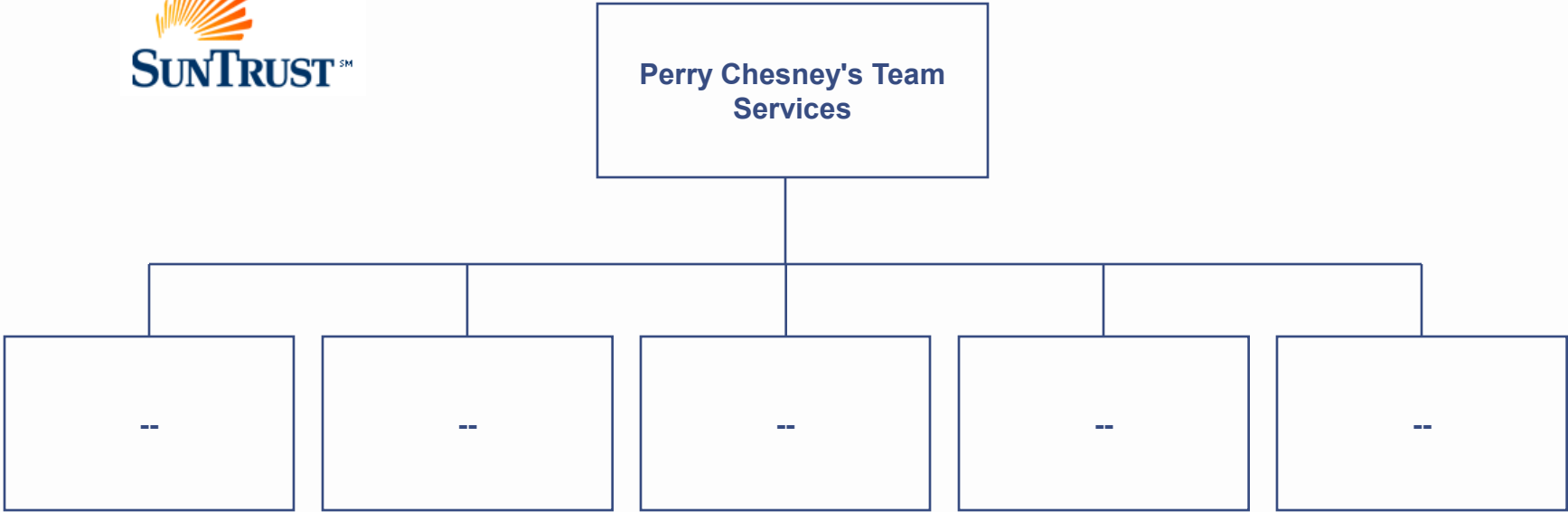


2017

2018

Perry Chesney's Team Provides a Number of Services, Including...

Perry Chesney's Team Services



Source: Tiburon Research & Analysis

Perry Chesney's Team's First Service is ____



Comments

- --

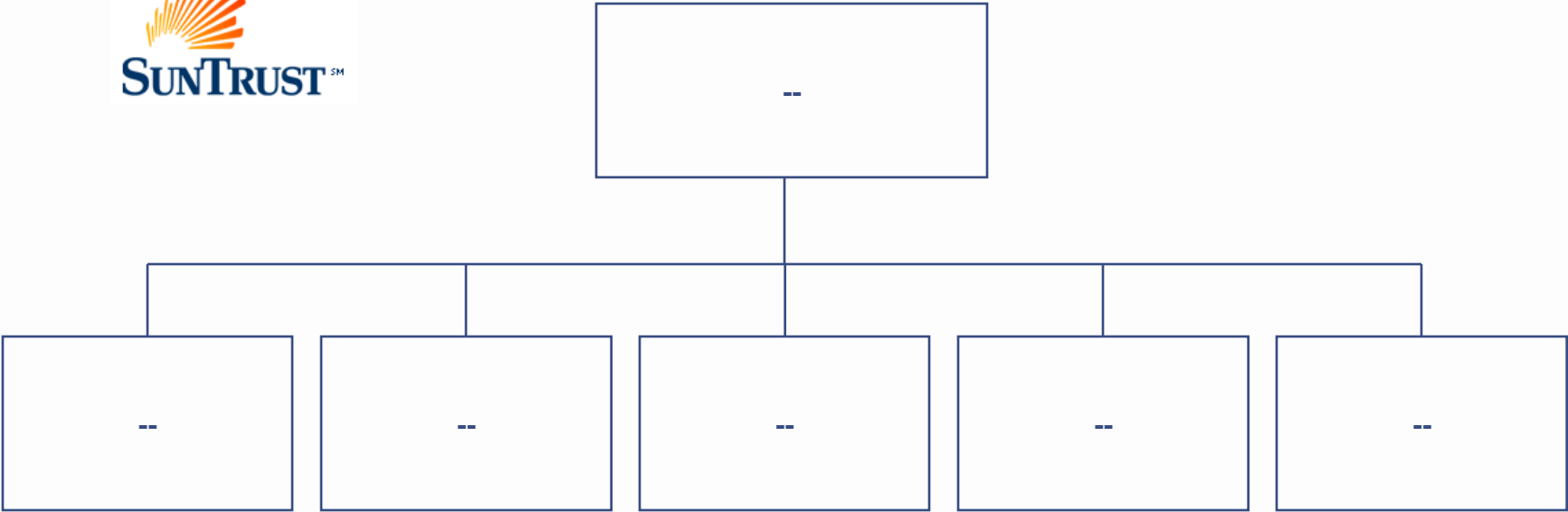
Perry Chesney's Team's Second Service is ____



Comments

- --


Perry Chesney's Team Organizational Chart



Source: Tiburon Research & Analysis

Perry Chesney's Team Has a Board of Directors Led by its Chairman...

Perry Chesney's Team Board of Directors

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



Comments

- --

Perry Chesney's Team Has Assets

Needs data

Perry Chesney's Team Assets (\$ Millions)



2017 2018

Source: Tiburon Research & Analysis

Perry Chesney's Team Has Liabilities

Needs data

Perry Chesney's Team Liabilities (\$ Millions)



2017 2018

Source: Tiburon Research & Analysis

Perry Chesney's Team Has Shareholders' Equity

Needs data

Perry Chesney's Team Shareholders Equity (\$ Millions)



2017

2018

Perry Chesney's Team Earns ... Per Share

Needs data

Perry Chesney's Team Earnings Per Share



2017

2018

Perry Chesney's Team Declares ... Dividends Per Share

Needs data

Perry Chesney's Team Dividends Per Share



2017 2018

Needs data

Perry Chesney's Team Dividend Yield



2017

2018

Perry Chesney's Team's Stock Price is ...

Needs data

Perry Chesney's Team Stock Price



2017

2018

Perry Chesney's Team Has ... Shares Outstanding

Needs data

Perry Chesney's Team Shares Outstanding



2017

2018

Needs data

Perry Chesney's Team Market Capitalization (\$ Millions)

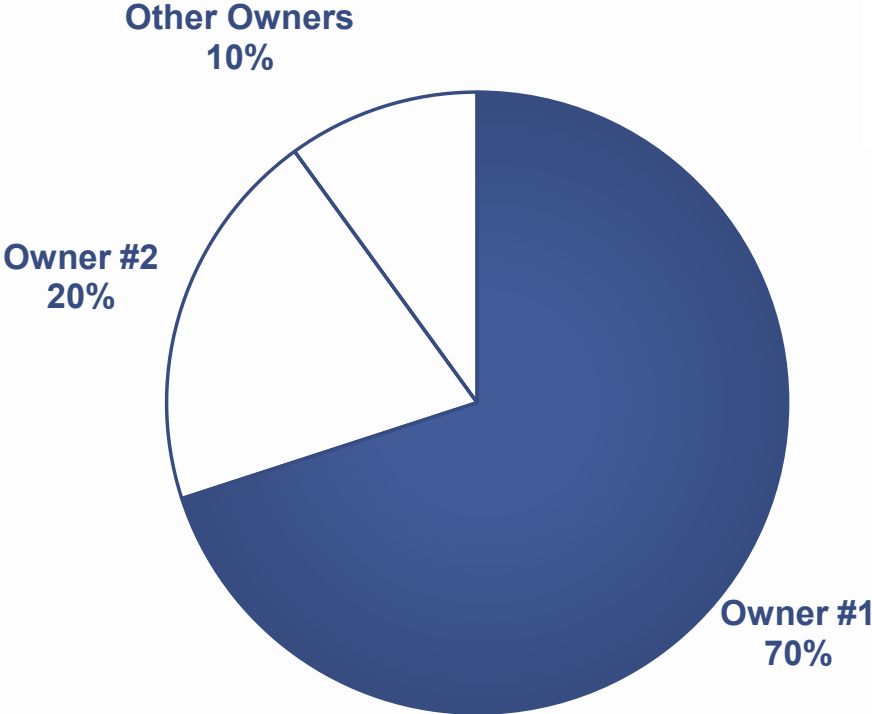


2017 2018

Perry Chesney's Team is Owned by

Needs data

Perry Chesney's Team Ownership By Owner



Source: Tiburon Research & Analysis

Perry Chesney's Team's Stock Volume is....

Needs data

Perry Chesney's Team Stock Volume



2017

2018



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