

Peter Rohr's Team

A Leading Broker at Merrill
Lynch

Tiburon Written Research
December 29, 2018



TIBURON STRATEGIC ADVISORS

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

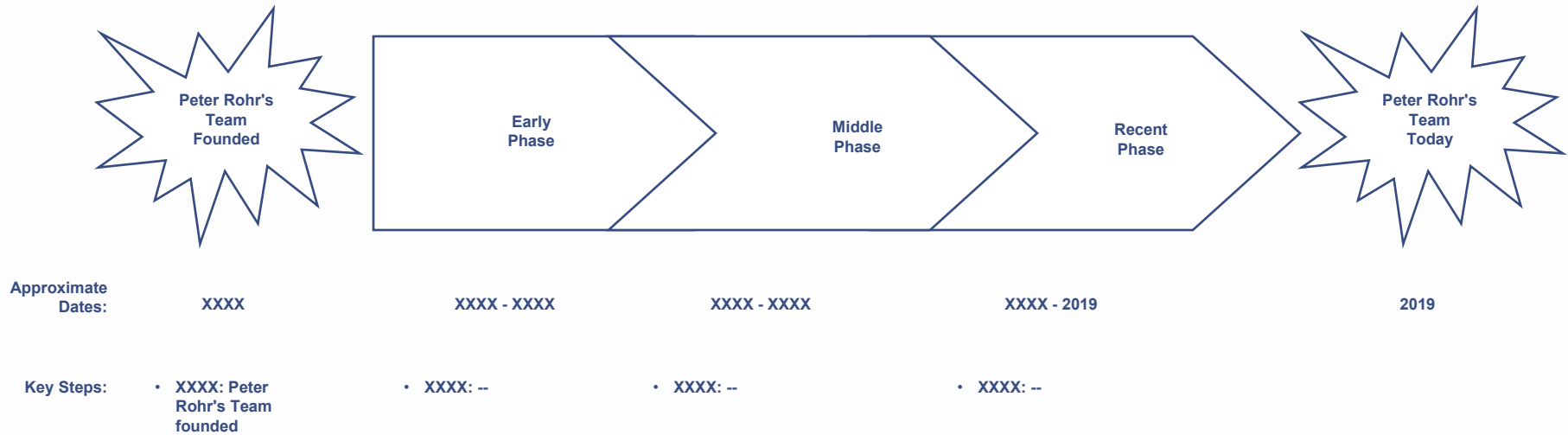
Comments

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



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

Peter Rohr's Team History



Comments

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



Peter Rohr's Team is Not a Frequent Advertiser

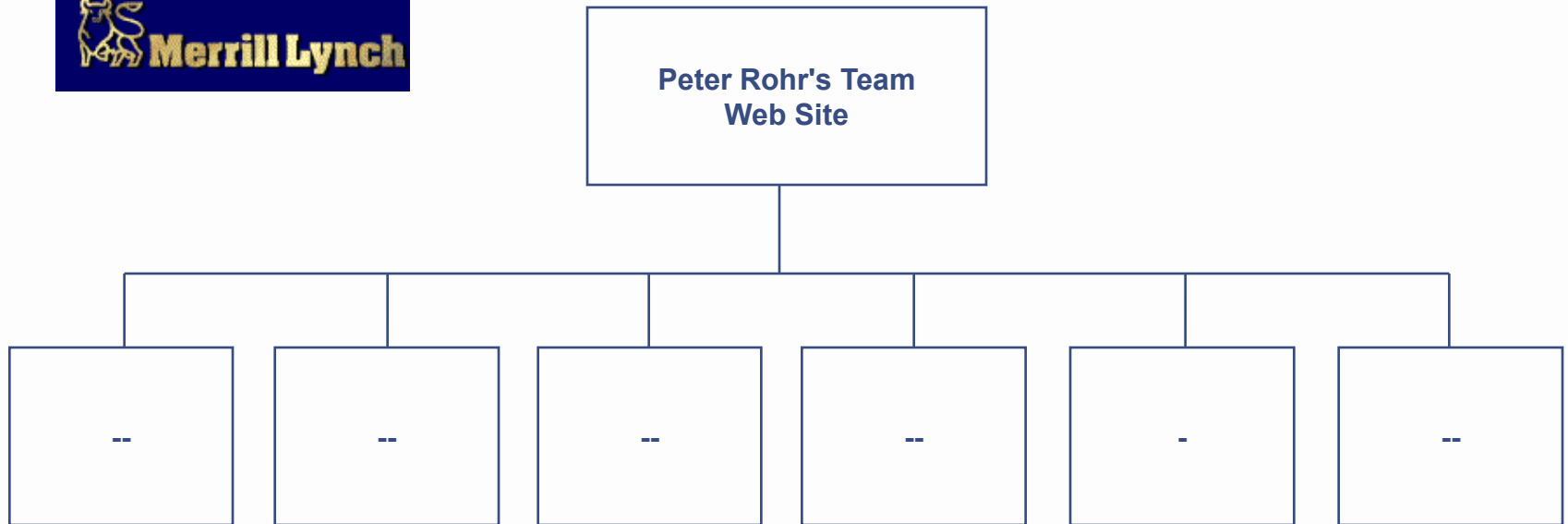
Comments

- --



Peter Rohr's Team Has a Web Site with XXXX Core Sections, Including _____

Peter Rohr's Team Web Site



Peter Rohr's Team Has a Charitable Giving Program

Comments

- --



Peter Rohr's Team is Not a Frequent Acquirer

Comments

- --



Peter Rohr's Team Has Employees

Peter Rohr's Team Employees



Peter Rohr's Team Clients



2017

2018

Peter Rohr's Team Has Gathered Accounts

Peter Rohr's Team Accounts



2017

2018

Peter Rohr's Team Has an \$___ Average Account Size

Peter Rohr's Team Average Account Size



Peter Rohr's Team Has Gathered Assets Under Administration

Peter Rohr's Team Assets Under Administration (\$ Millions)



Source: Tiburon Research & Analysis

Peter Rohr's Team Revenues (\$ Millions)



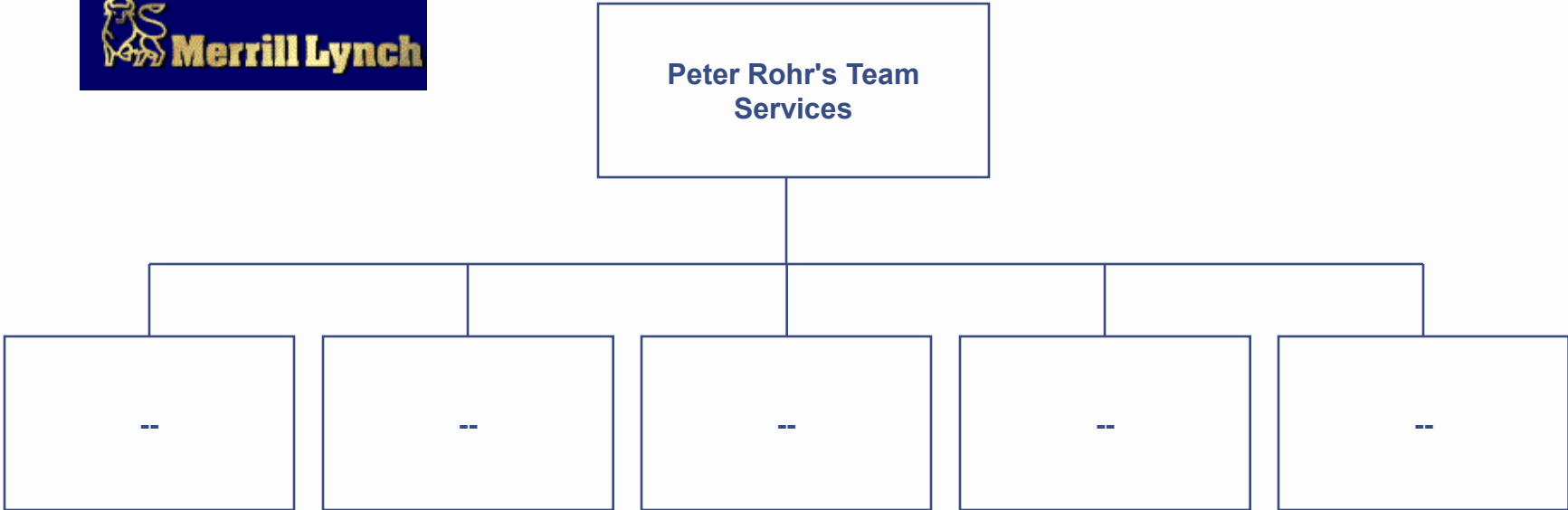
Peter Rohr's Team Earns \$___ Million

Peter Rohr's Team Net Profits (\$ Millions)



Peter Rohr's Team Provides a Number of Services, Including...

Peter Rohr's Team Services



Source: Tiburon Research & Analysis

Peter Rohr's Team's First Service is ____

Comments

- --



Peter Rohr's Team's Second Service is ____

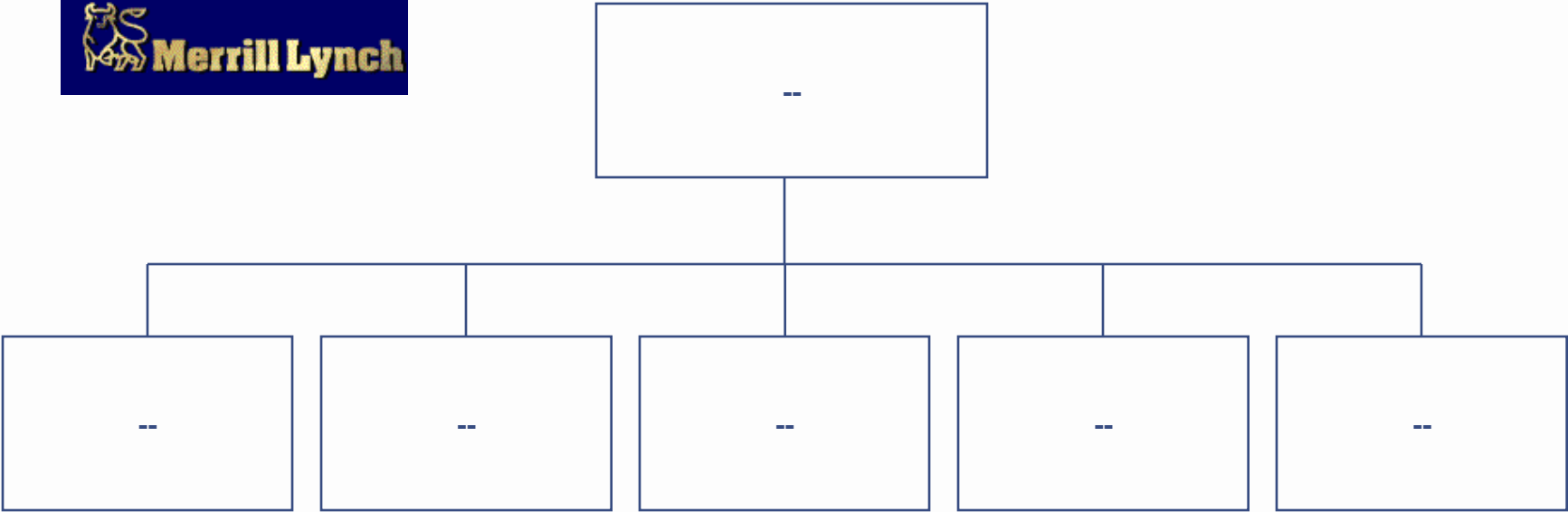
Comments

- --



Peter Rohr's Team is Led by ...


Peter Rohr's Team Organizational Chart



Source: Tiburon Research & Analysis

Peter Rohr's Team Has a Board of Directors Led by its Chairman...

Peter Rohr's Team Board of Directors

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

Source: Tiburon Research & Analysis

Peter Rohr's Team is Privately Owned

Comments

- --



Peter Rohr's Team Assets (\$ Millions)



2017 2018

Peter Rohr's Team Liabilities (\$ Millions)



Peter Rohr's Team Has Shareholders' Equity

Peter Rohr's Team Shareholders Equity (\$ Millions)



Peter Rohr's Team Earns ... Per Share

Peter Rohr's Team Earnings Per Share



Peter Rohr's Team Declares ... Dividends Per Share

Peter Rohr's Team Dividends Per Share



Peter Rohr's Team Has a ... Dividend Yield

Peter Rohr's Team Dividend Yield



Peter Rohr's Team's Stock Price is ...

Peter Rohr's Team Stock Price



2017

2018

Peter Rohr's Team Has ... Shares Outstanding

Peter Rohr's Team Shares Outstanding

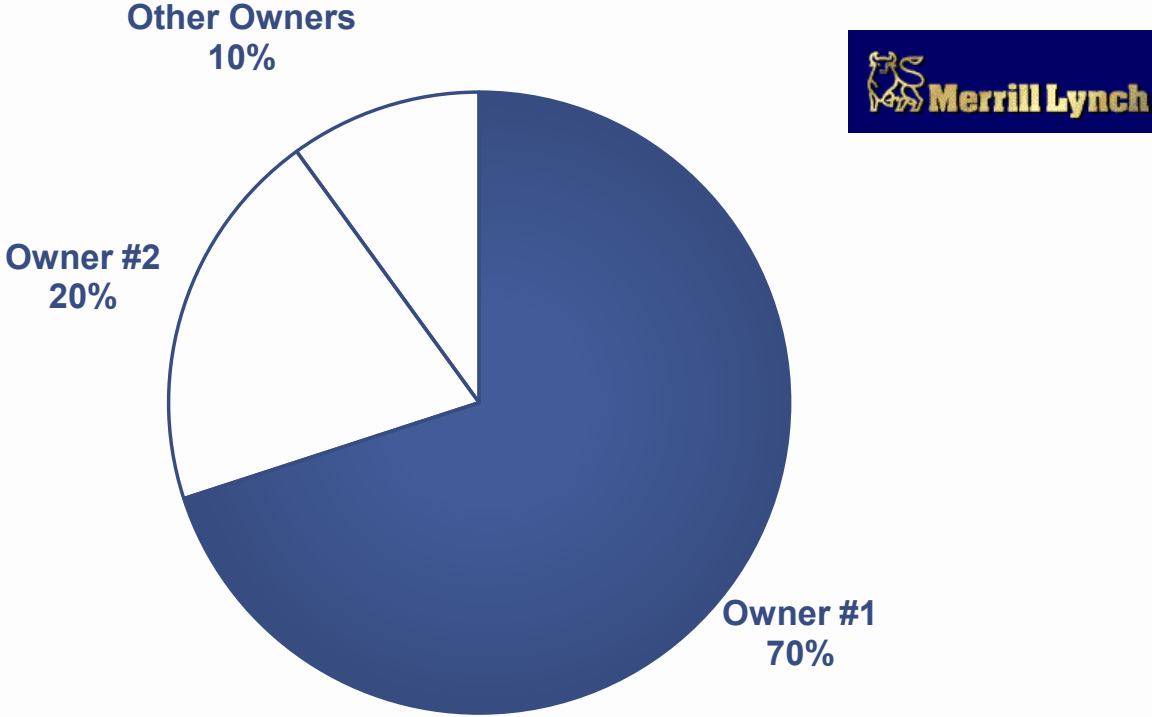


Peter Rohr's Team Market Capitalization (\$ Millions)



Peter Rohr's Team is Owned by

Peter Rohr's Team Ownership By Owner



Source: Tiburon Research & Analysis

Peter Rohr's Team's Stock Volume is....

Peter Rohr's Team Stock Volume





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