

Phil Scott'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

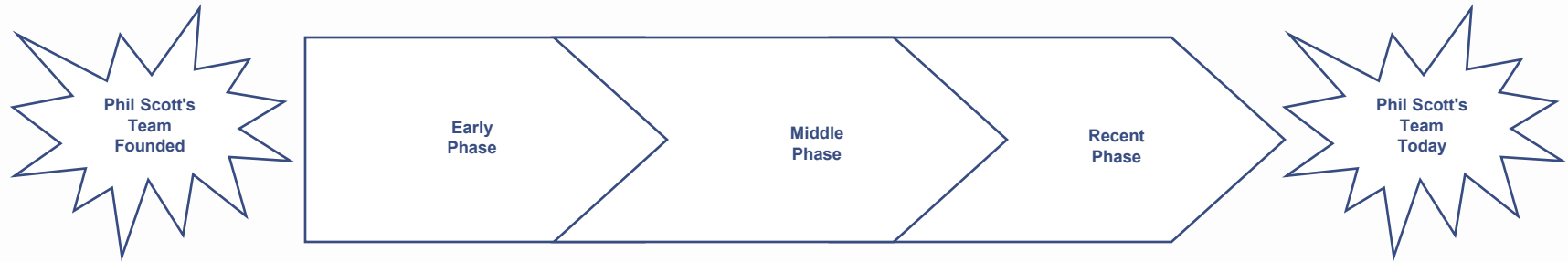
Comments

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



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

Phil Scott's Team History



Approximate Dates:

XXXX

XXXX - XXXX

XXXX - XXXX

XXXX - 2019

2019

Key Steps:

- XXXX: Phil Scott's Team founded

- XXXX: --

- XXXX: --

- XXXX: --



Phil Scott's Team was Founded in XXXX

Comments

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



Phil Scott's Team is Not a Frequent Advertiser

Advertising

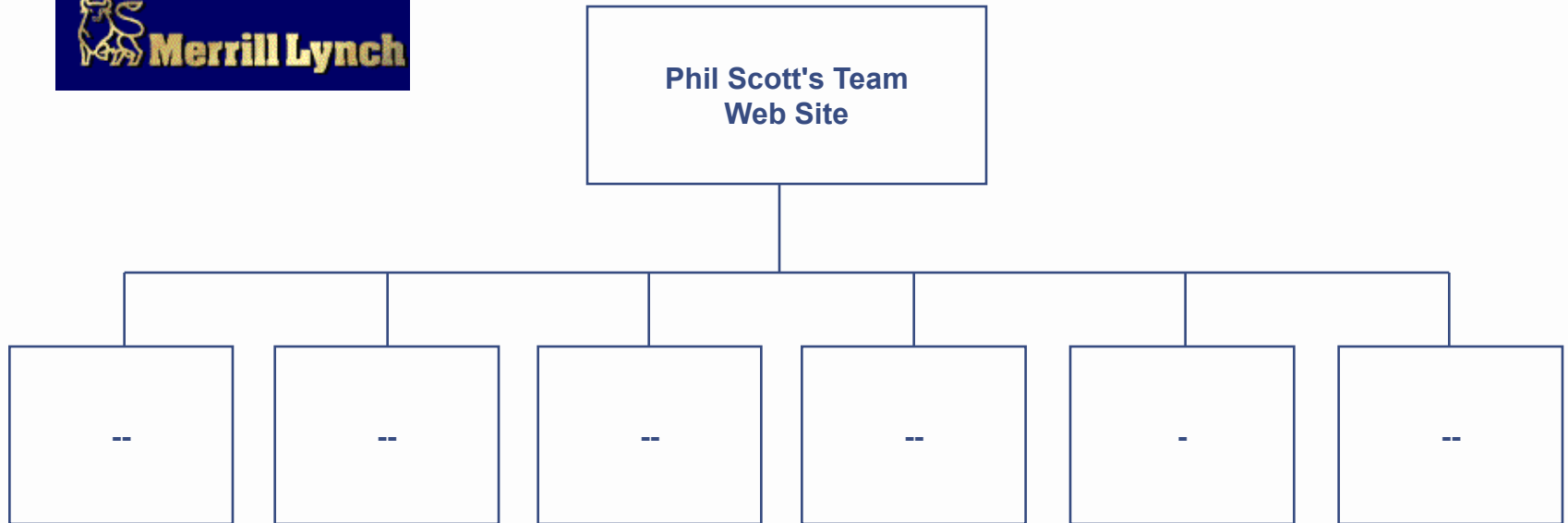
Comments

- --



Phil Scott's Team Has a Web Site with XXXX Core Sections, Including _____

Phil Scott's Team Web Site



Phil Scott's Team Has a Charitable Giving Program

Charitable
Giving

Comments

- --



Phil Scott's Team is Not a Frequent Acquirer

Acquisitions

Comments

- --



Phil Scott's Team Employees



Needs data

Phil Scott's Team Clients



2017 2018

Source: Tiburon Research & Analysis

Phil Scott's Team Has Gathered Accounts

Needs data

Phil Scott's Team Accounts



2017

2018

Phil Scott's Team Has an \$___ Average Account Size

Needs data

Phil Scott's Team Average Account Size



2017

2018

Phil Scott's Team Has Gathered Assets Under Administration

Needs data

Phil Scott's Team Assets Under Administration (\$ Millions)



Source: Tiburon Research & Analysis

Phil Scott's Team Generates Revenues

Needs data

Phil Scott's Team Revenues (\$ Millions)



Source: Tiburon Research & Analysis

Phil Scott's Team Earns \$___ Million

Needs data

Phil Scott's Team Net Profits (\$ Millions)

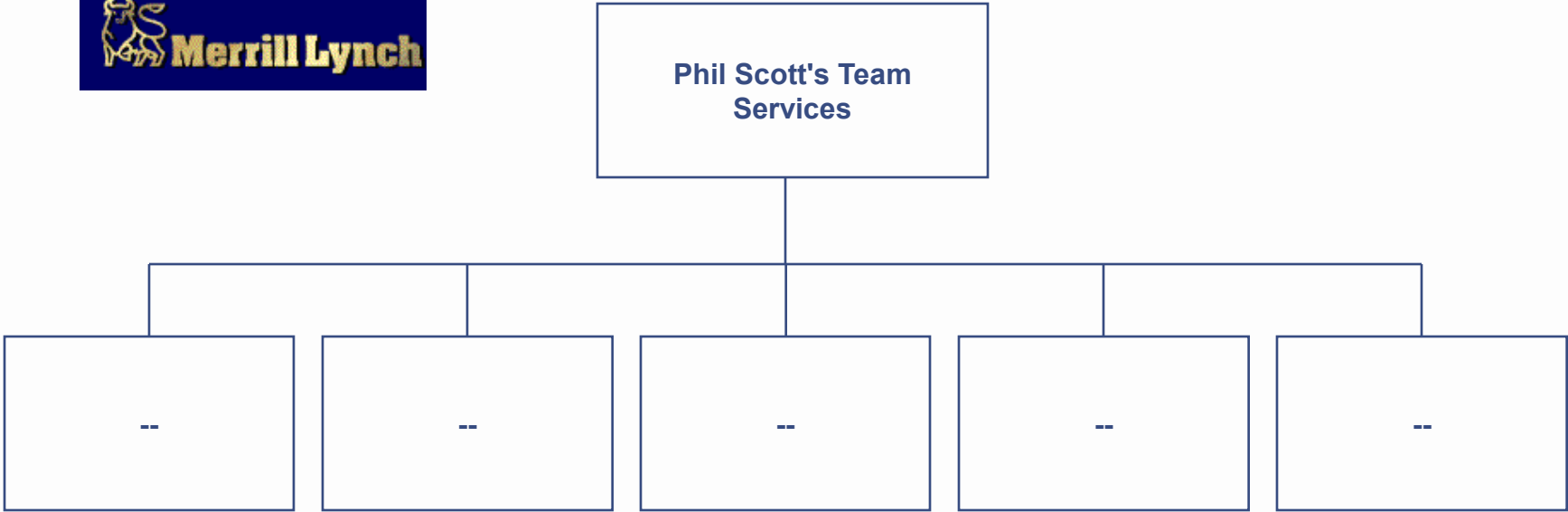


2017

2018

Phil Scott's Team Provides a Number of Services, Including...

Phil Scott's Team Services



Source: Tiburon Research & Analysis

Phil Scott's Team's First Service is ____

Comments

- --



Phil Scott's Team's Second Service is ____

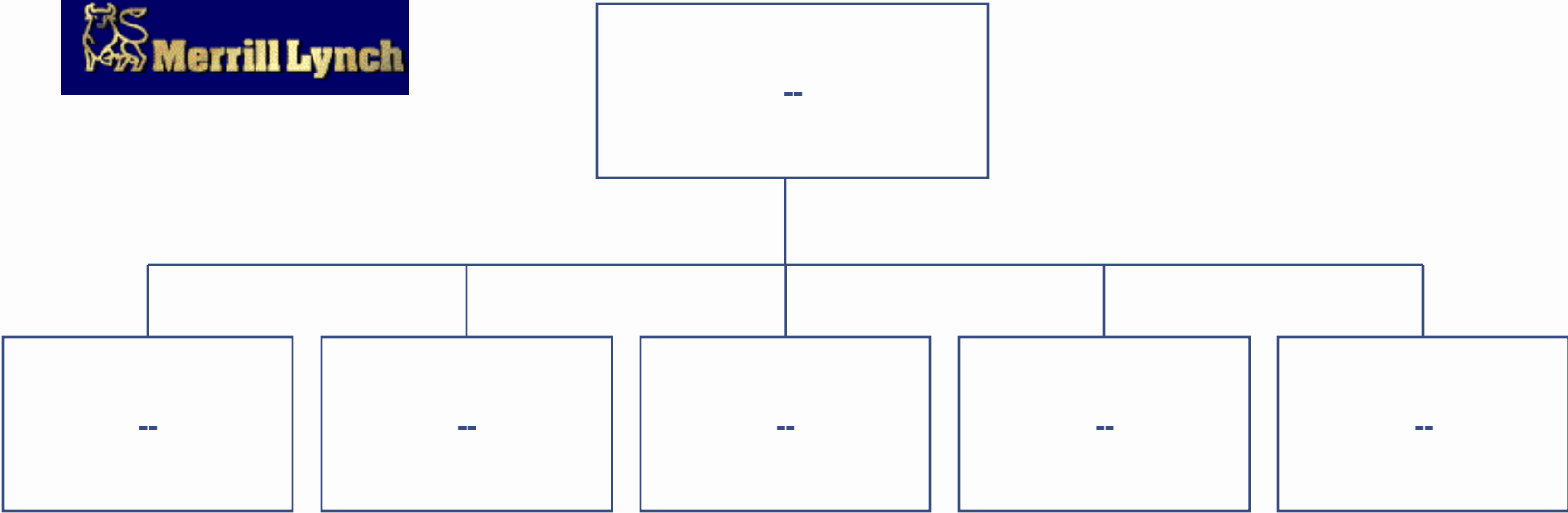
Comments

- --



Phil Scott's Team is Led by ...


Phil Scott's Team Organizational Chart



Source: Tiburon Research & Analysis

Phil Scott's Team Has a Board of Directors Led by its Chairman...

Phil Scott's Team Board of Directors

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

Source: Tiburon Research & Analysis

Comments

- --



Phil Scott's Team Has Assets

Needs data

Phil Scott's Team Assets (\$ Millions)



2017 2018

Source: Tiburon Research & Analysis

Phil Scott's Team Has Liabilities

Needs data

Phil Scott's Team Liabilities (\$ Millions)



2017 2018

Phil Scott's Team Has Shareholders' Equity

Needs data

Phil Scott's Team Shareholders Equity (\$ Millions)



2017 2018

Phil Scott's Team Earns ... Per Share

Needs data

Phil Scott's Team Earnings Per Share



2017

2018

Phil Scott's Team Declares ... Dividends Per Share

Needs data

Phil Scott's Team Dividends Per Share



2017 2018

Phil Scott's Team Has a ... Dividend Yield

Needs data

Phil Scott's Team Dividend Yield



2017

2018

Phil Scott's Team's Stock Price is ...

Needs data

Phil Scott's Team Stock Price



2017

2018

Phil Scott's Team Has ... Shares Outstanding

Needs data

Phil Scott's Team Shares Outstanding



2017 2018

Phil Scott's Team's Market Capitalization is ...

Needs data

Phil Scott's Team Market Capitalization (\$ Millions)

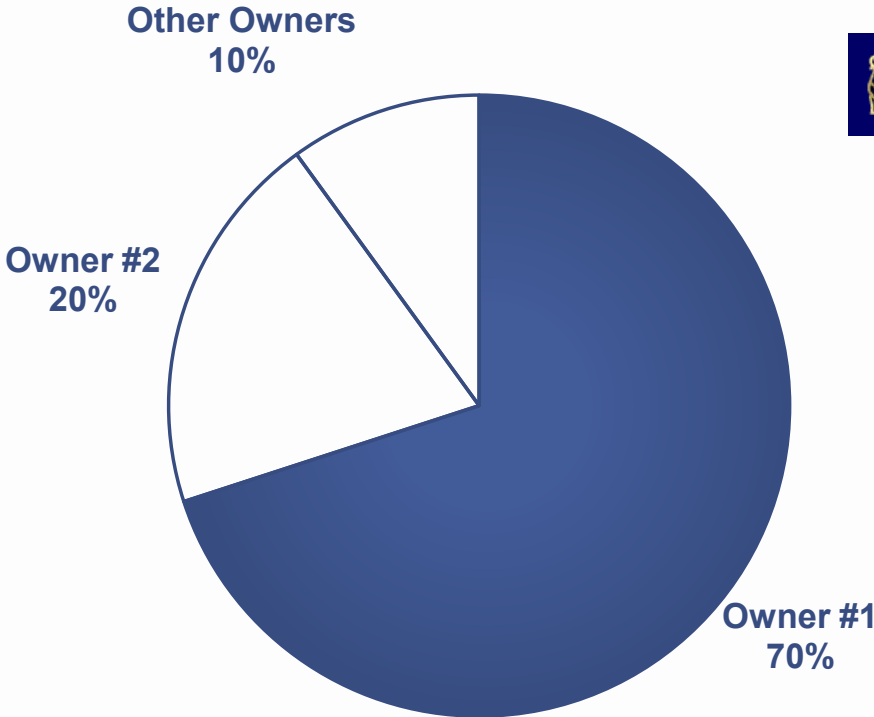


2017 2018

Phil Scott's Team is Owned by

Needs data

Phil Scott's Team Ownership By Owner



Source: Tiburon Research & Analysis

Phil Scott's Team's Stock Volume is....

Needs data

Phil Scott's Team Stock Volume



2017 2018



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