

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

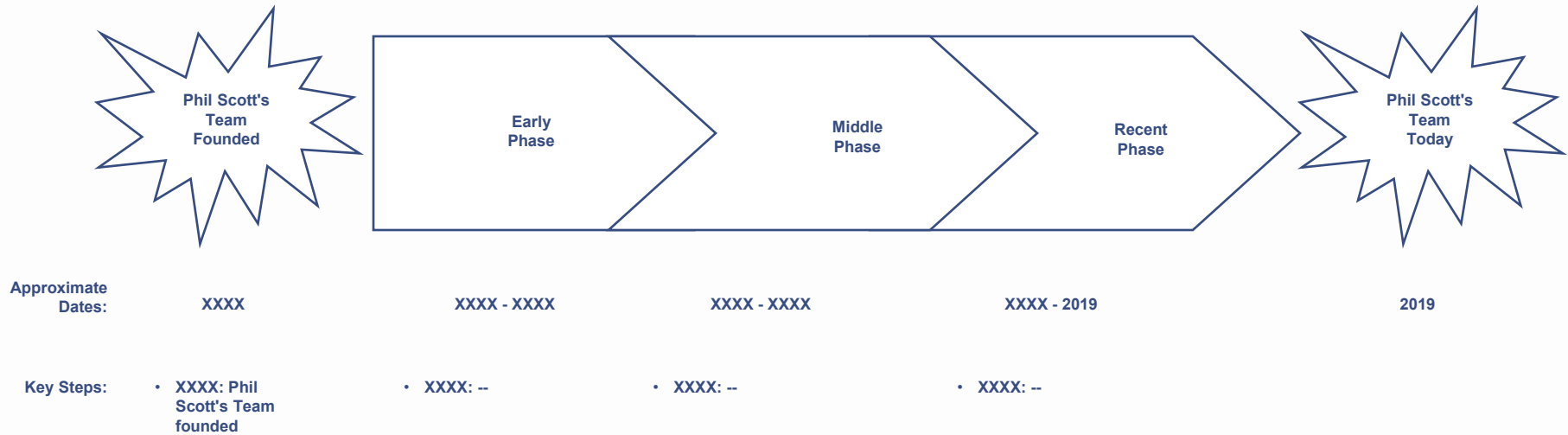
Comments

- **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



Phil Scott's Team was Founded in XXXX

Comments

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



Phil Scott's Team is Not a Frequent Advertiser

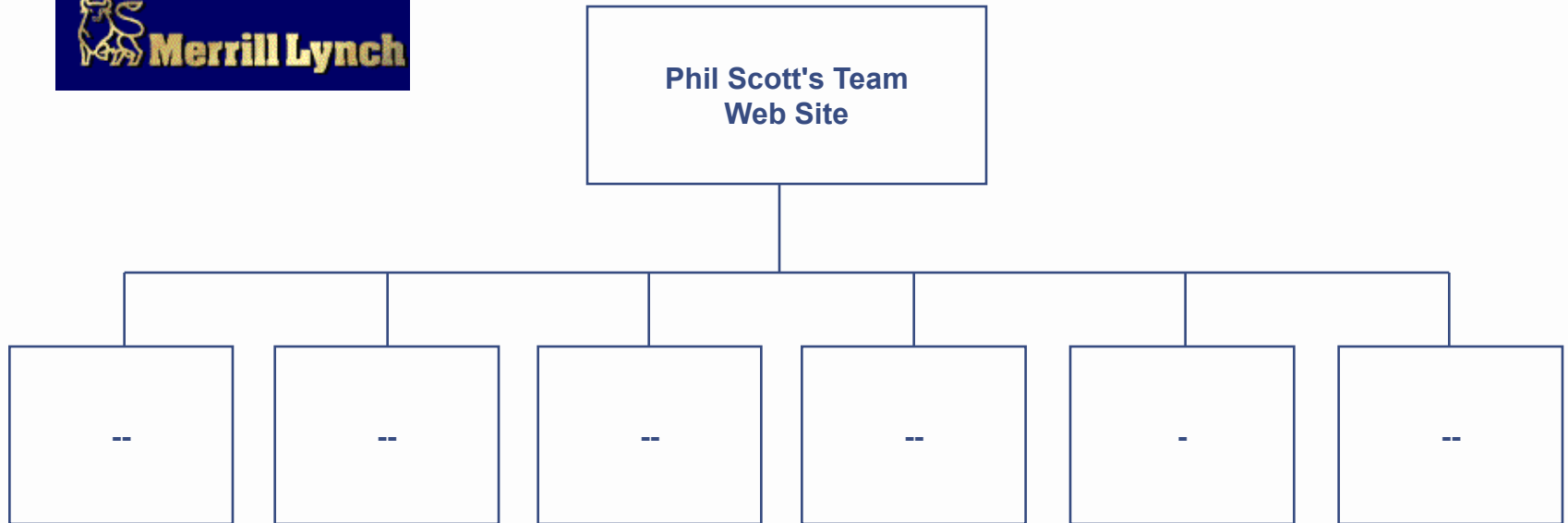
Comments

- --



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

Comments

- --



Phil Scott's Team is Not a Frequent Acquirer

Comments

- --



Phil Scott's Team Employees



Phil Scott's Team Clients



2017

2018

Phil Scott's Team Has Gathered Accounts

Phil Scott's Team Accounts



2017

2018

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

Phil Scott's Team Average Account Size



Phil Scott's Team Has Gathered Assets Under Administration

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



Phil Scott's Team Generates Revenues

Phil Scott's Team Revenues (\$ Millions)



Phil Scott's Team Earns \$___ Million

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

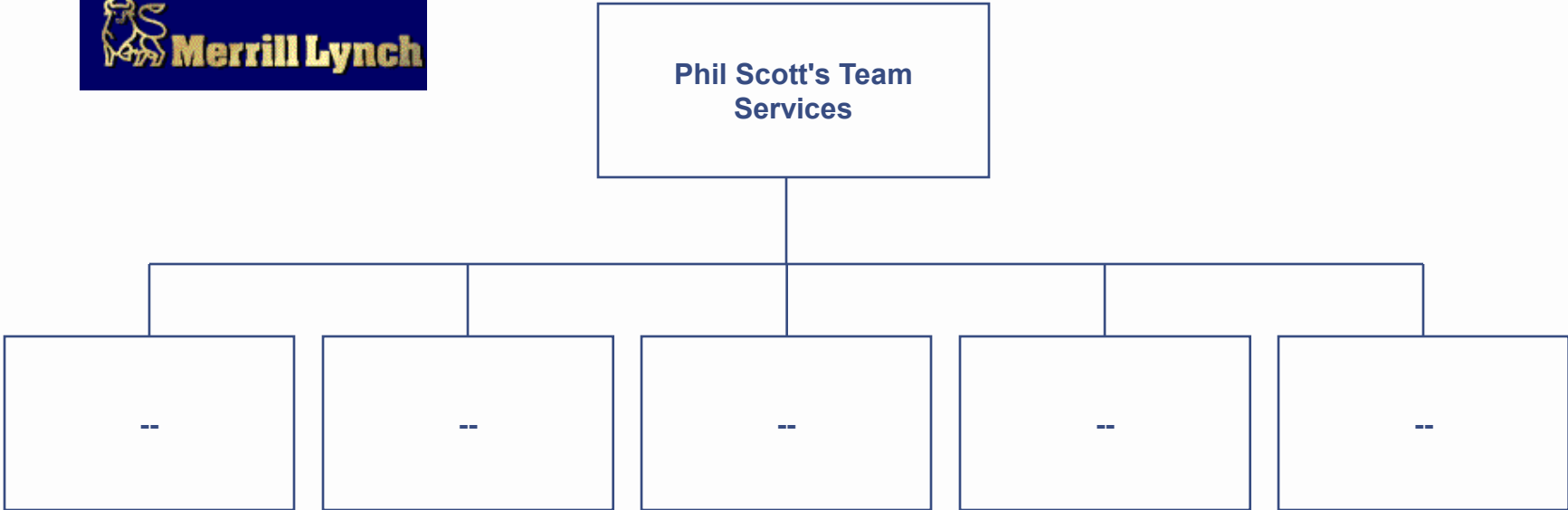


2017

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 ____

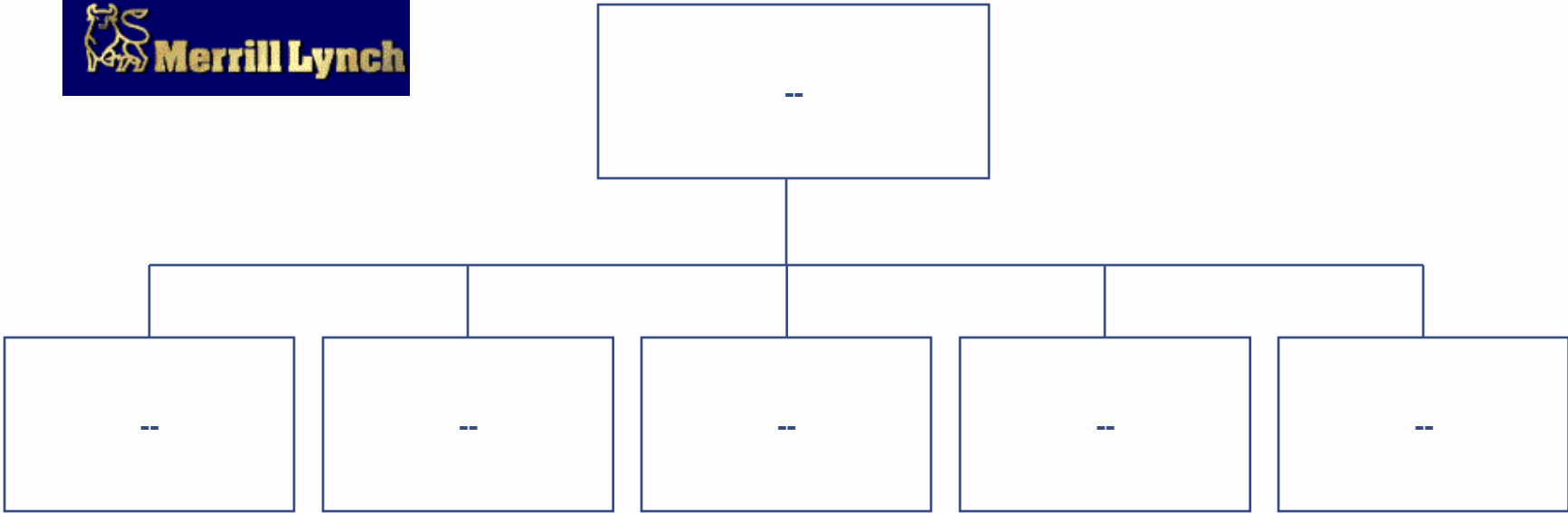
Comments

- --



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 Assets (\$ Millions)



2017 2018

Phil Scott's Team Liabilities (\$ Millions)



2017 2018

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



Phil Scott's Team Earns ... Per Share

Phil Scott's Team Earnings Per Share



2017 2018

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

Phil Scott's Team Dividends Per Share



Phil Scott's Team Dividend Yield



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

Phil Scott's Team Stock Price



Phil Scott's Team Has ... Shares Outstanding

Phil Scott's Team Shares Outstanding



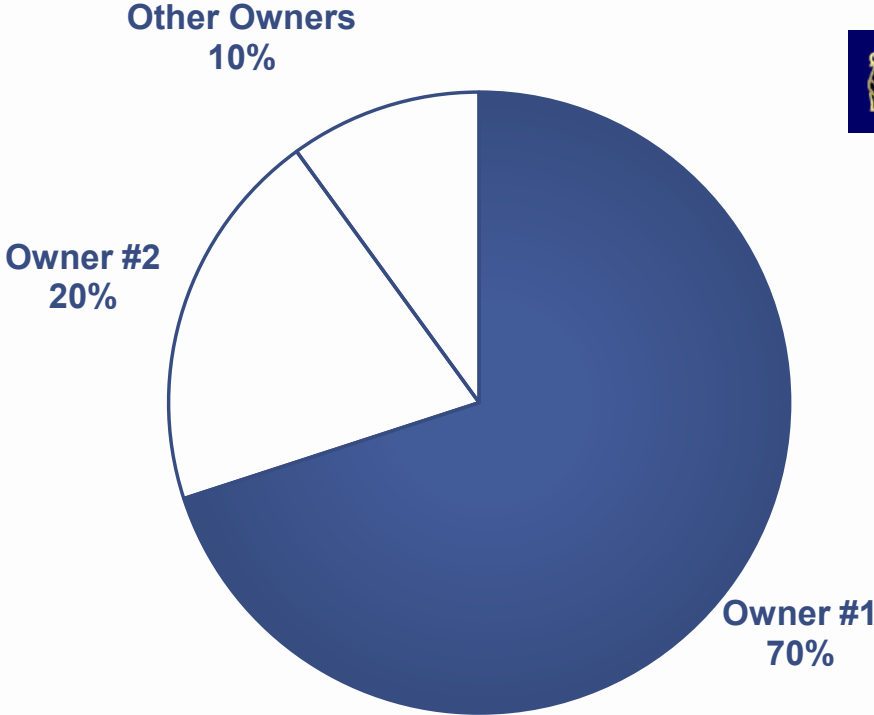
Phil Scott's Team's Market Capitalization is ...

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



Phil Scott's Team is Owned by

Phil Scott's Team Ownership By Owner



Source: Tiburon Research & Analysis

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

Phil Scott's Team Stock Volume





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