

Reza Zafari's Team

A Leading Broker at Merrill Lynch

Tiburon Written Research
February 9, 2019



TIBURON STRATEGIC ADVISORS

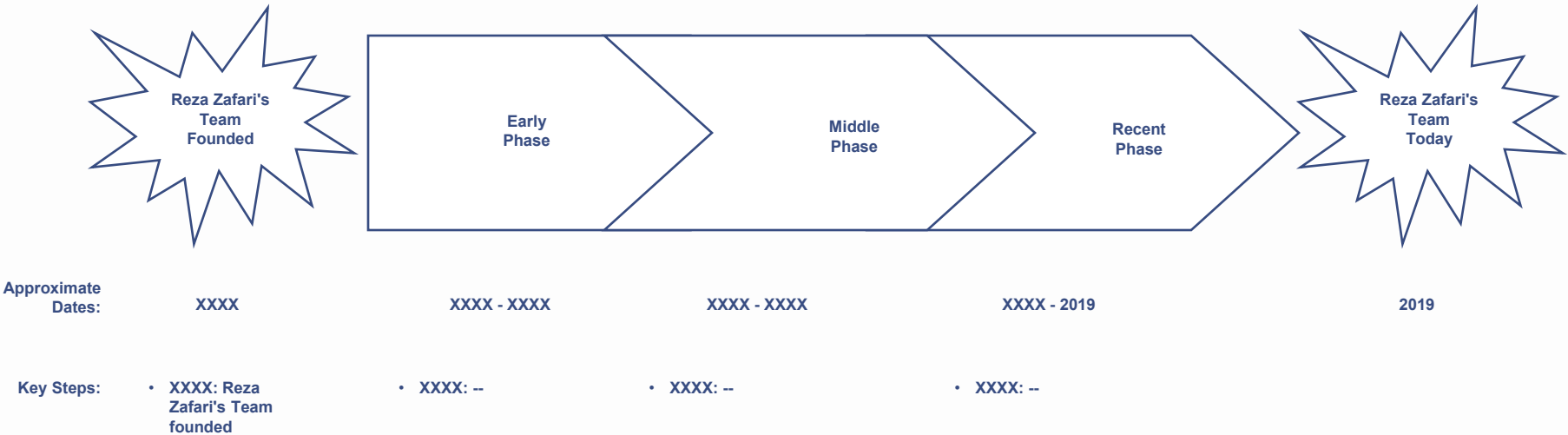
Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (& WealthTech) Firms



Comments
• Founded in XXXX • Based in XXXX

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

**Reza Zafari's Team
History**



Source: Tiburon Research & Analysis



Comments
• Founded in XXXX • Based in XXXX

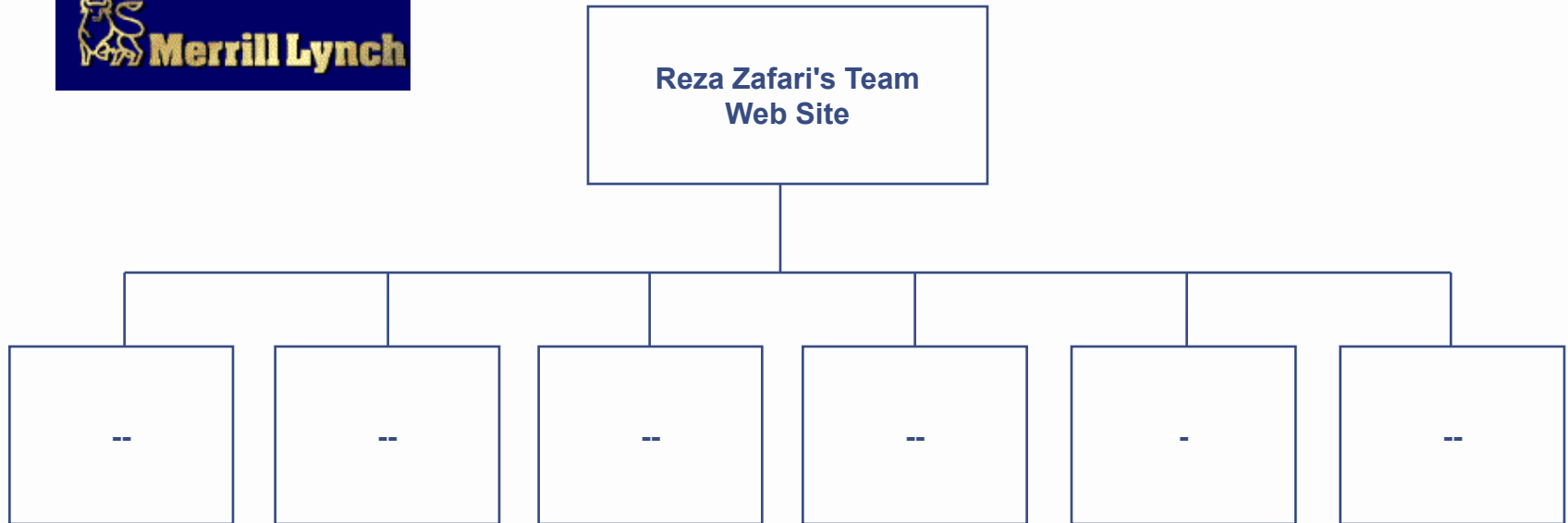
Comments

- --



Reza Zafari's Team Has a Web Site with XXXX Core Sections, Including __

Reza Zafari's Team Web Site



Reza Zafari's Team Has a Charitable Giving Program



Comments
--

Source: Tiburon Research & Analysis

Comments

- --



Reza Zafari's Team
Employees



Source: Tiburon Research & Analysis

**Reza Zafari's Team
Clients**



Source: Tiburon Research & Analysis

**Reza Zafari's Team
Accounts**



Source: Tiburon Research & Analysis

Reza Zafari's Team Has an \$___ Average Account Size

**Reza Zafari's Team
Average Account Size**



Source: Tiburon Research & Analysis

**Reza Zafari's Team
Assets Under Administration
(\$ Millions)**



Source: Tiburon Research & Analysis

**Reza Zafari's Team
Revenues
(\$ Millions)**



Source: Tiburon Research & Analysis

Reza Zafari's Team Earns \$___ Million

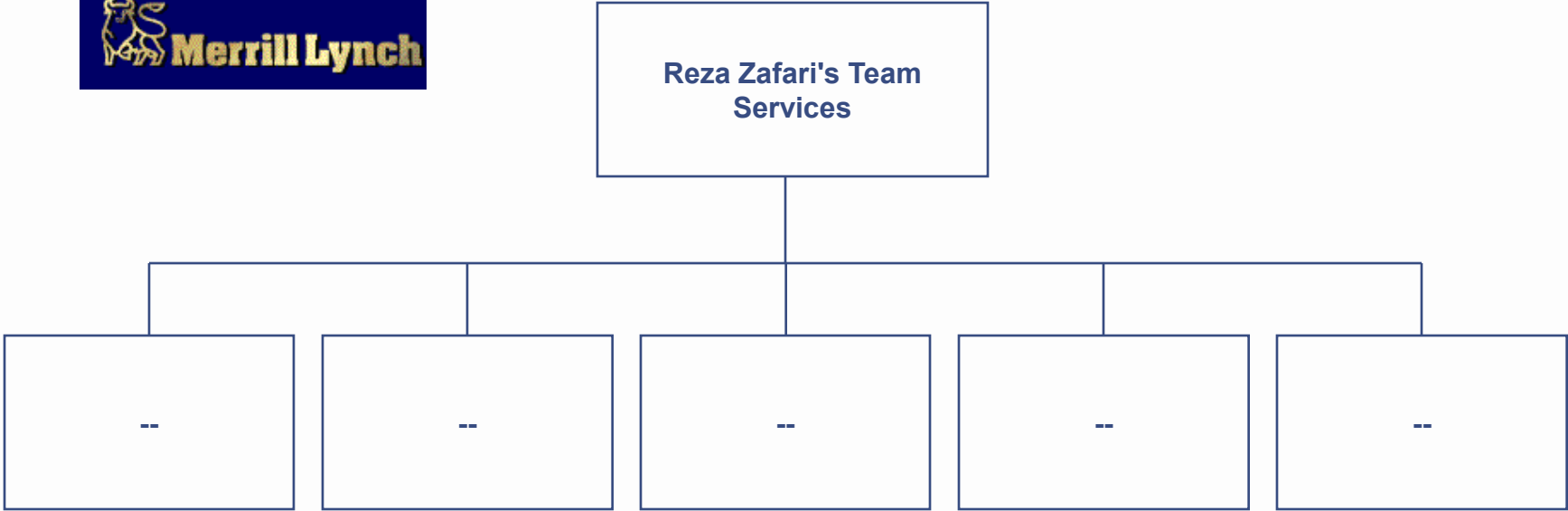
**Reza Zafari's Team
Net Profits
(\$ Millions)**



Source: Tiburon Research & Analysis

Reza Zafari's Team Provides a Number of Services, Including...

**Reza Zafari's Team
Services**



Source: Tiburon Research & Analysis

Reza Zafari's Team's First Service is ____

Comments

- --



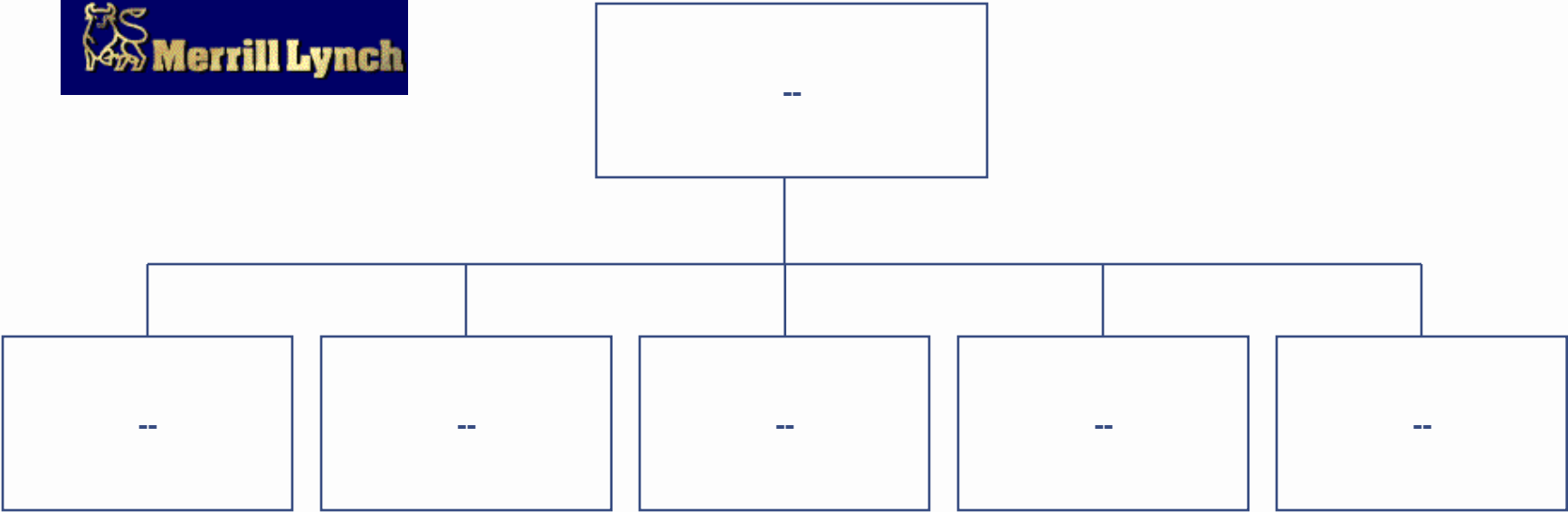
Reza Zafari's Team's Second Service is ____



Comments	
•	--

Source: Tiburon Research & Analysis

Reza Zafari's Team
Organizational Chart



Reza Zafari's Team Has a Board of Directors Led by its Chairman...

Reza Zafari's Team Board of Directors

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

Source: Tiburon Research & Analysis



Comments	
•	--

**Reza Zafari's Team
Assets
(\$ Millions)**



Source: Tiburon Research & Analysis

**Reza Zafari's Team
Liabilities
(\$ Millions)**



Source: Tiburon Research & Analysis

Reza Zafari's Team Has Shareholders' Equity

**Reza Zafari's Team
Shareholders Equity
(\$ Millions)**



Source: Tiburon Research & Analysis

**Reza Zafari's Team
Earnings Per Share**



Source: Tiburon Research & Analysis

**Reza Zafari's Team
Dividends Per Share**



**Reza Zafari's Team
Dividend Yield**



Source: Tiburon Research & Analysis

**Reza Zafari's Team
Stock Price**



Source: Tiburon Research & Analysis

Reza Zafari's Team Has ... Shares Outstanding

Reza Zafari's Team Shares Outstanding



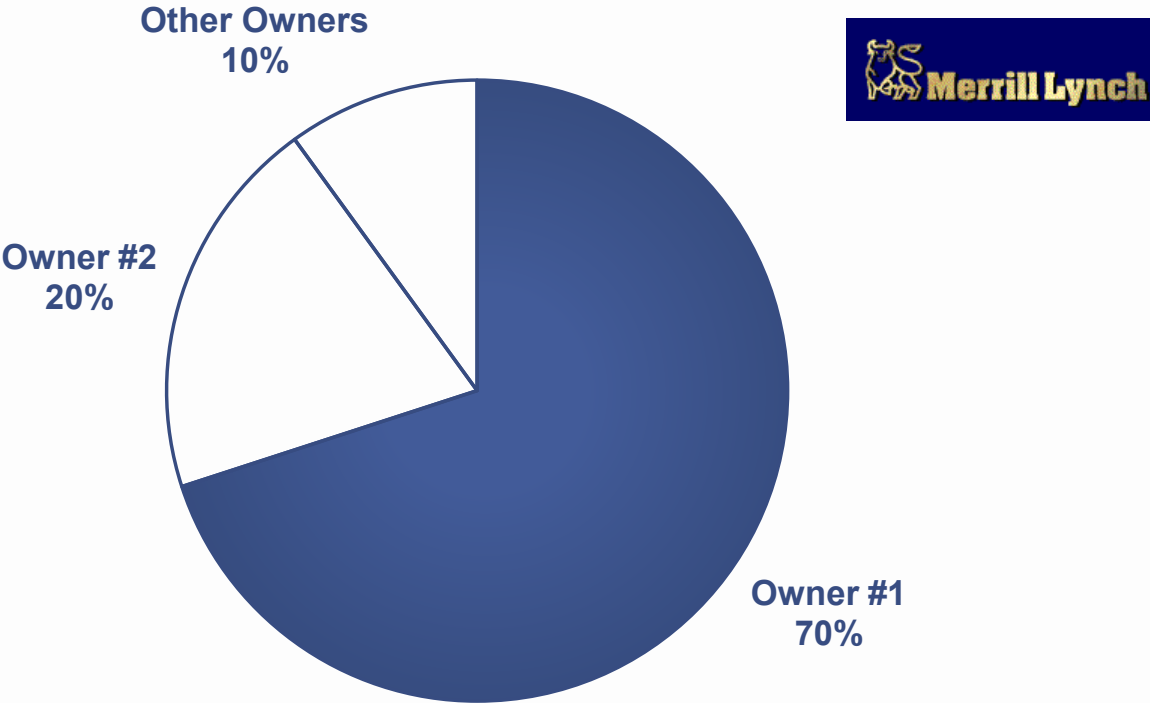
Source: Tiburon Research & Analysis

**Reza Zafari's Team
Market Capitalization
(\$ Millions)**



Source: Tiburon Research & Analysis

Reza Zafari's Team
Ownership
By Owner



Source: Tiburon Research & Analysis

Reza Zafari's Team's Stock Volume is....

**Reza Zafari's Team
Stock Volume**



Source: Tiburon Research & Analysis



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