

Richard Whiting's Team

A Leading Bank Broker

Tiburon Written Research
December 26, 2018



TIBURON STRATEGIC ADVISORS

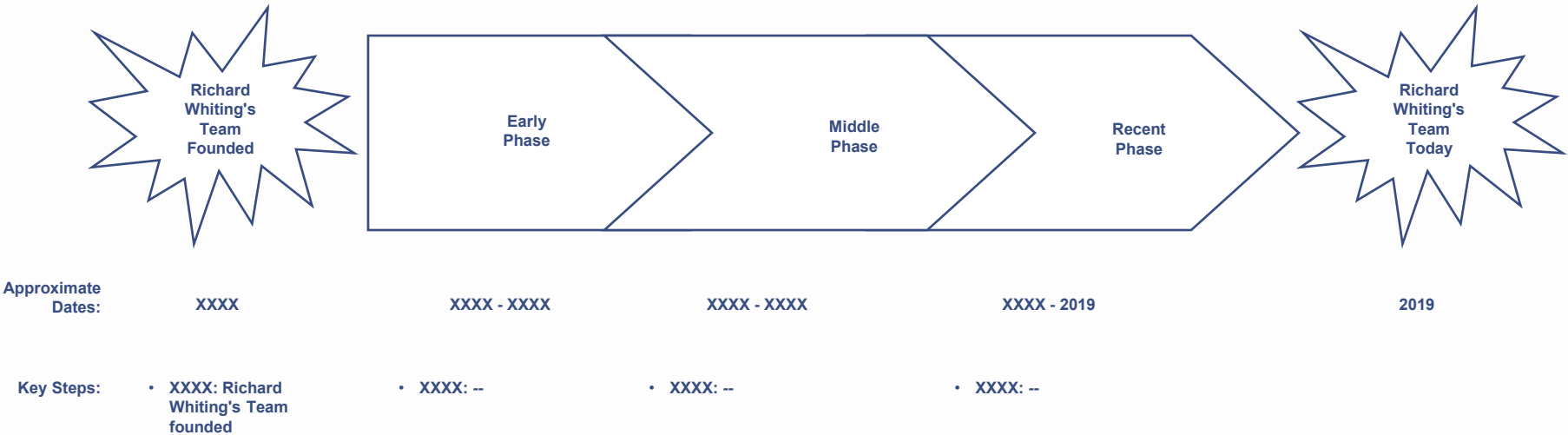
Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (& WealthTech) Firms



Comments
• Founded in XXXX • Based in XXXX

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

Richard Whiting's Team History



Source: Tiburon Research & Analysis

Richard Whiting's Team was Founded in XXXX



Comments
• Founded in XXXX • Based in XXXX

Source: Tiburon Research & Analysis

Richard Whiting's Team is Not a Frequent Advertiser

Advertising

Comments

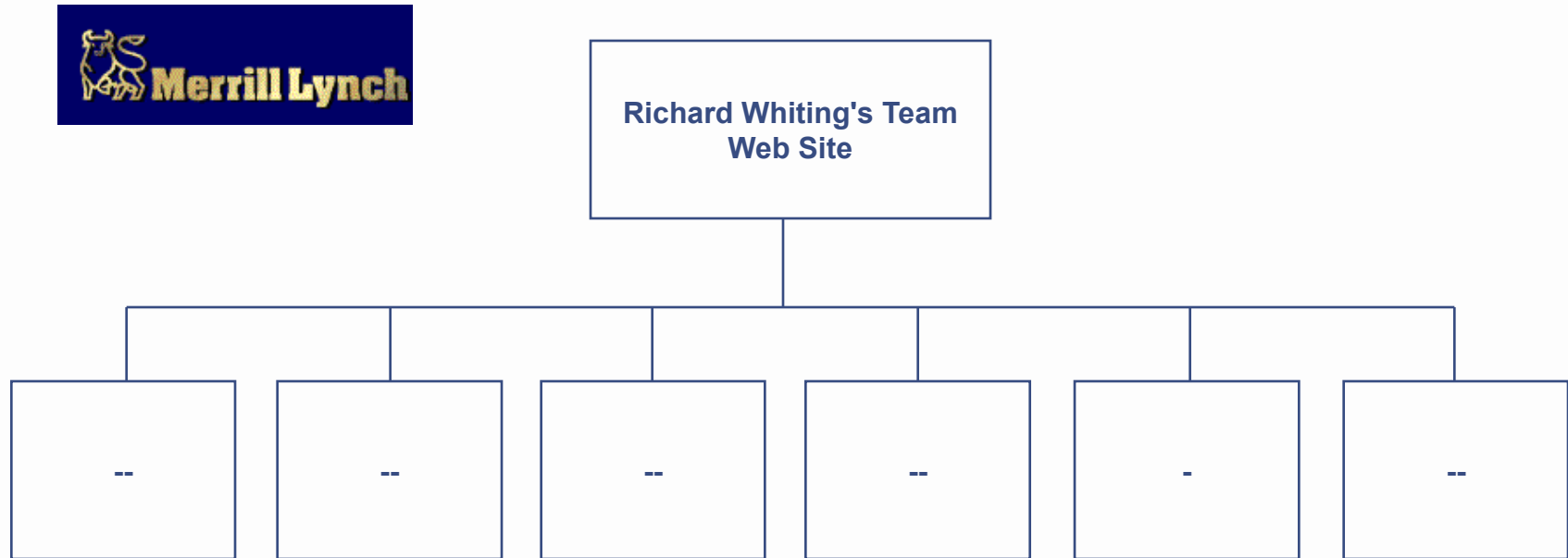
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Source: Tiburon Research & Analysis

Richard Whiting's Team Has a Web Site with XXXX Core Sections, Including _____

Richard Whiting's Team Web Site



Richard Whiting's Team Has a Charitable Giving Program

Charitable Giving

Comments

- --



Source: Tiburon Research & Analysis

Richard Whiting's Team is Not a Frequent Acquirer

Acquisitions

Comments

- --



Source: Tiburon Research & Analysis

**Richard Whiting's Team
Employees**



Source: Tiburon Research & Analysis

Needs data

Richard Whiting's Team
Clients



Source: Tiburon Research & Analysis

Needs data

**Richard Whiting's Team
Accounts**



Richard Whiting's Team Has an \$___ Average Account Size

Needs data

**Richard Whiting's Team
Average Account Size**



Source: Tiburon Research & Analysis

Richard Whiting's Team Has Gathered Assets Under Administration

Needs data

Richard Whiting's Team Assets Under Administration (\$ Millions)



Source: Tiburon Research & Analysis

Needs data

**Richard Whiting's Team
Revenues
(\$ Millions)**



Source: Tiburon Research & Analysis

Richard Whiting's Team Earns \$___ Million

Needs data

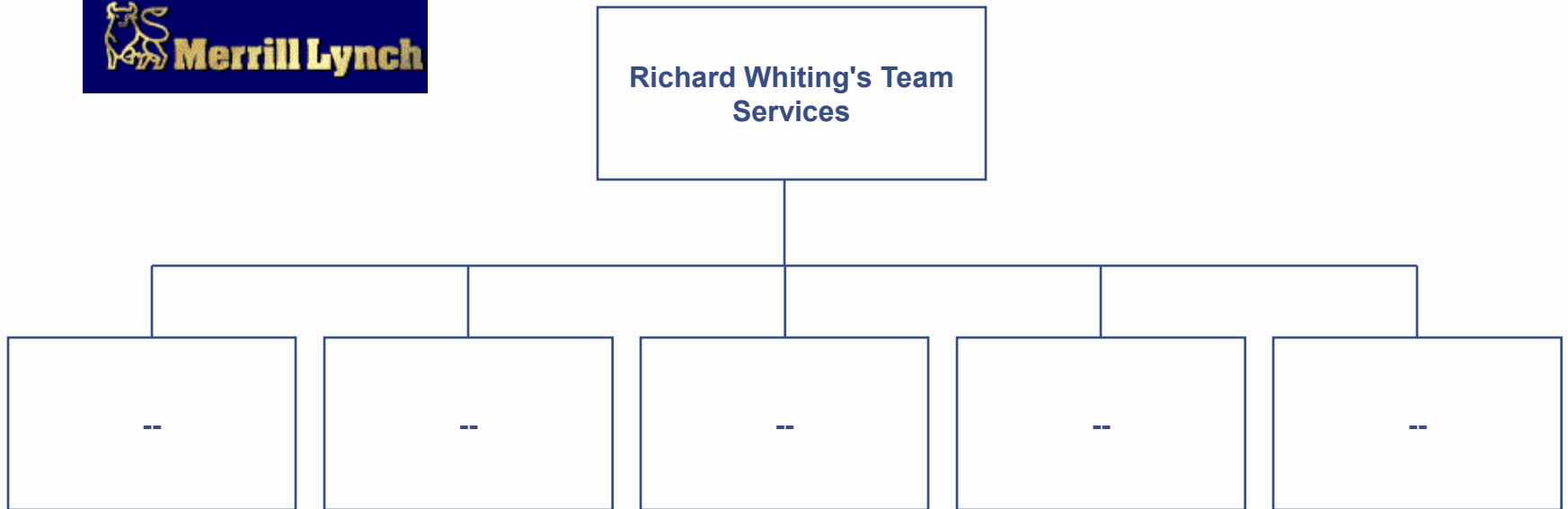
**Richard Whiting's Team
Net Profits
(\$ Millions)**



Source: Tiburon Research & Analysis

Richard Whiting's Team Provides a Number of Services, Including...

Richard Whiting's Team Services



Richard Whiting's Team's First Service is ____

Comments

- --

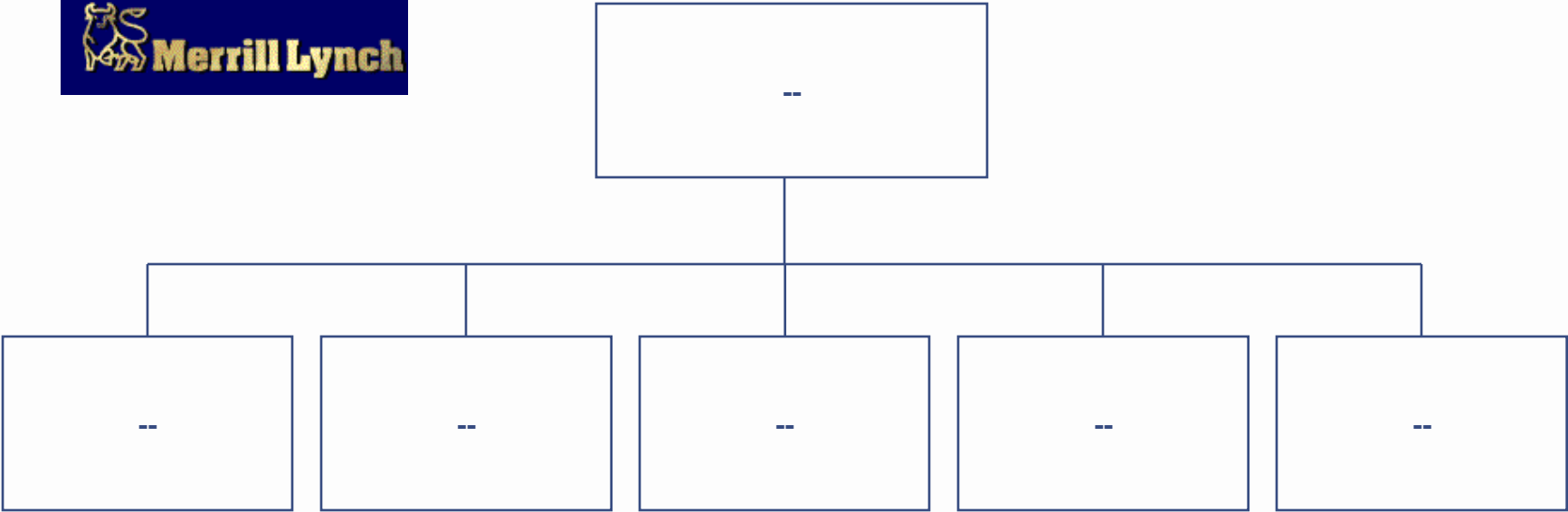


Richard Whiting's Team's Second Service is ____



Comments	
•	--

**Richard Whiting's Team
Organizational Chart**



Richard Whiting's Team Has a Board of Directors Led by its Chairman...

**Richard Whiting's Team
Board of Directors**

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

Source: Tiburon Research & Analysis



Comments	
•	--

Needs data

**Richard Whiting's Team
Assets
(\$ Millions)**



Needs data

**Richard Whiting's Team
Liabilities
(\$ Millions)**



2017 2018

Richard Whiting's Team Has Shareholders' Equity

Needs data

Richard Whiting's Team Shareholders Equity (\$ Millions)



Source: Tiburon Research & Analysis

Richard Whiting's Team Earns ... Per Share

Needs data

**Richard Whiting's Team
Earnings Per Share**



Source: Tiburon Research & Analysis

Richard Whiting's Team Declares ... Dividends Per Share

Needs data

**Richard Whiting's Team
Dividends Per Share**



Source: Tiburon Research & Analysis

Needs data

**Richard Whiting's Team
Dividend Yield**



Richard Whiting's Team's Stock Price is ...

Needs data

**Richard Whiting's Team
Stock Price**



Needs data

**Richard Whiting's Team
Shares Outstanding**



Richard Whiting's Team's Market Capitalization is ...

Needs data

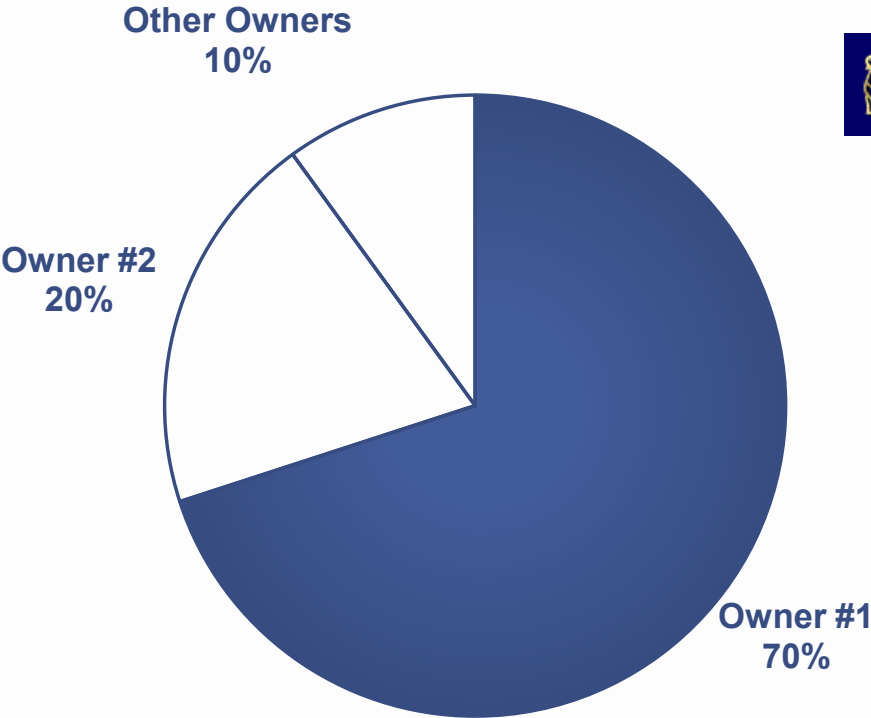
**Richard Whiting's Team
Market Capitalization
(\$ Millions)**



Source: Tiburon Research & Analysis

Needs data

Richard Whiting's Team
Ownership
By Owner



Richard Whiting's Team's Stock Volume is....

Needs data

**Richard Whiting's Team
Stock Volume**



Source: Tiburon Research & Analysis



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