

Robert Stulberg's Team

A Leading Broker at Merrill Lynch

Tiburon Written Research
January 13, 2019



TIBURON STRATEGIC ADVISORS

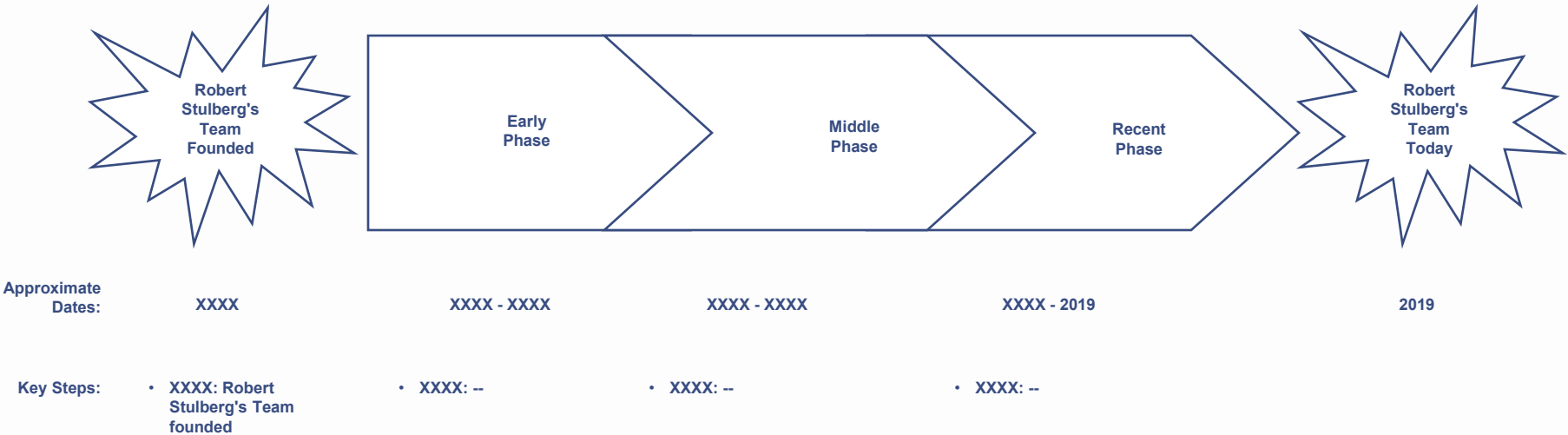
Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (& WealthTech) Firms



Comments
• Founded in XXXX • Based in XXXX

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

Robert Stulberg's Team History



Source: Tiburon Research & Analysis

Robert Stulberg's Team was Founded in XXXX



Comments
• Founded in XXXX • Based in XXXX

Source: Tiburon Research & Analysis

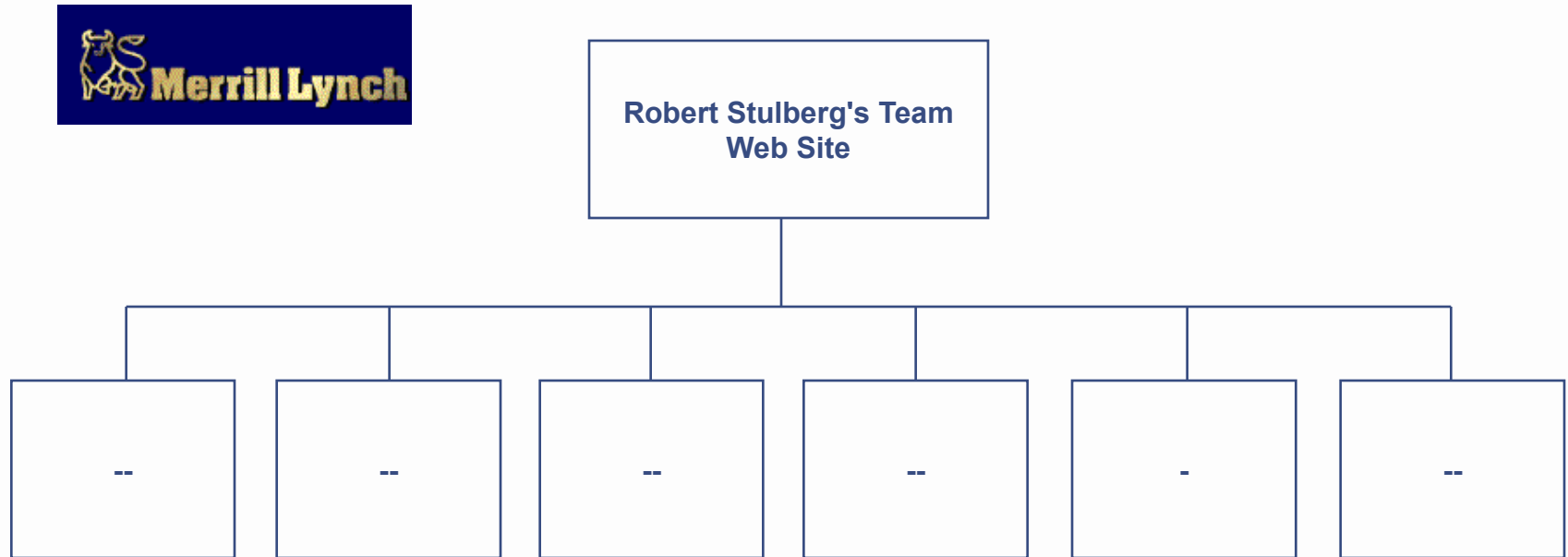
Comments

- --



Robert Stulberg's Team Has a Web Site with XXXX Core Sections, Including _____

Robert Stulberg's Team Web Site



Robert Stulberg's Team Has a Charitable Giving Program

Comments
• --

- --



Robert Stulberg's Team is Not a Frequent Acquirer



Comments	
•	--

Source: Tiburon Research & Analysis

**Robert Stulberg's Team
Employees**



Source: Tiburon Research & Analysis

**Robert Stulberg's Team
Clients**



Source: Tiburon Research & Analysis

**Robert Stulberg's Team
Accounts**



Source: Tiburon Research & Analysis

Robert Stulberg's Team Has an \$____ Average Account Size

**Robert Stulberg's Team
Average Account Size**



Source: Tiburon Research & Analysis

**Robert Stulberg's Team
Assets Under Administration
(\$ Millions)**



Source: Tiburon Research & Analysis

**Robert Stulberg's Team
Revenues
(\$ Millions)**



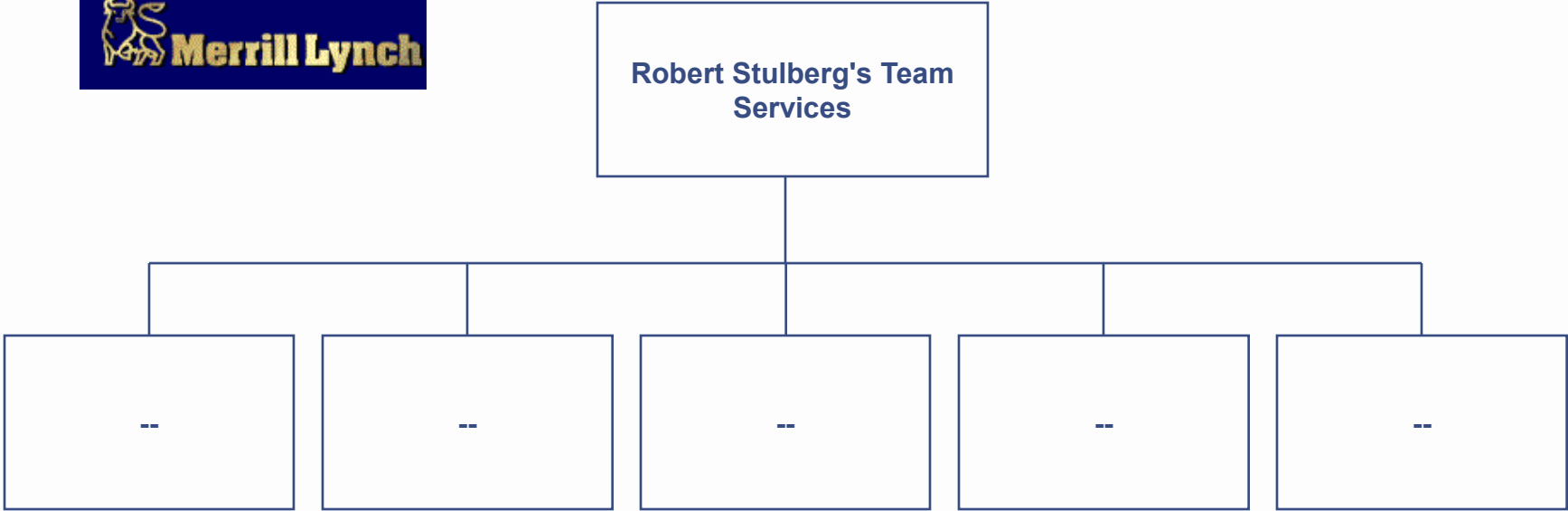
Robert Stulberg's Team Earns \$____ Million

**Robert Stulberg's Team
Net Profits
(\$ Millions)**



Source: Tiburon Research & Analysis

**Robert Stulberg's Team
Services**



Robert Stulberg's Team's First Service is ____



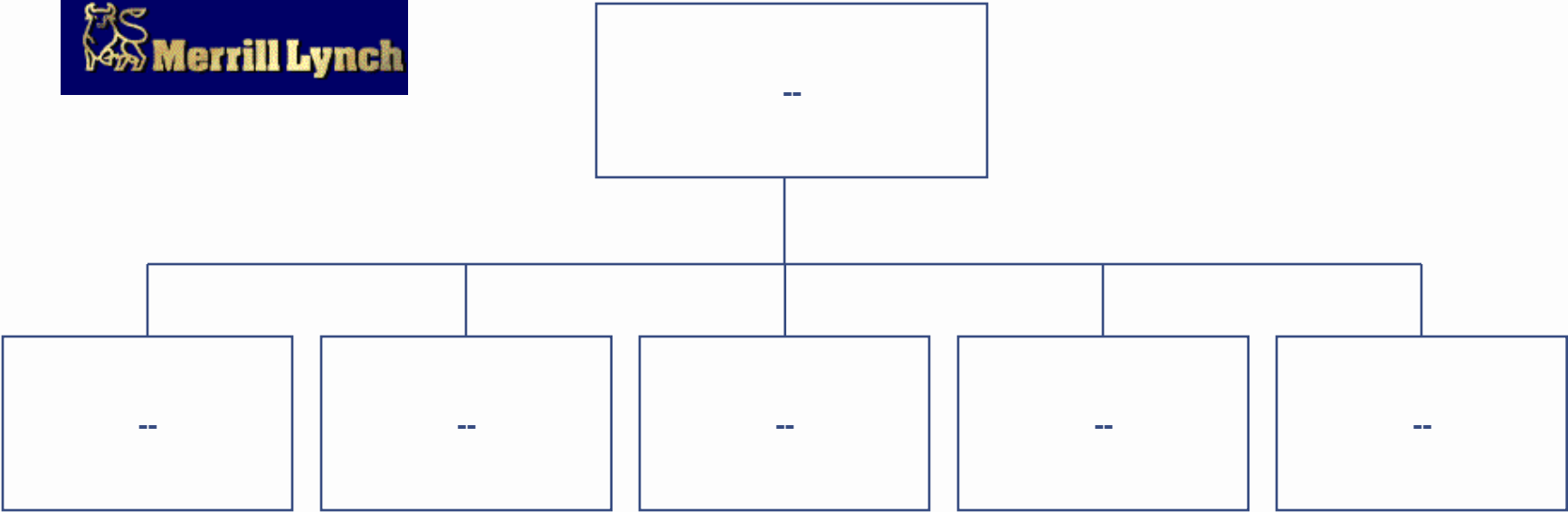
Comments
--

Robert Stulberg's Team's Second Service is ____



Comments	
•	--

Robert Stulberg's Team
Organizational Chart



Robert Stulberg's Team Has a Board of Directors Led by its Chairman...

**Robert Stulberg's Team
Board of Directors**

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

Source: Tiburon Research & Analysis



Comments	
•	--

**Robert Stulberg's Team
Assets
(\$ Millions)**



Source: Tiburon Research & Analysis

**Robert Stulberg's Team
Liabilities
(\$ Millions)**



**Robert Stulberg's Team
Shareholders Equity
(\$ Millions)**



Source: Tiburon Research & Analysis

**Robert Stulberg's Team
Earnings Per Share**



Robert Stulberg's Team Declares ... Dividends Per Share

**Robert Stulberg's Team
Dividends Per Share**



Source: Tiburon Research & Analysis

**Robert Stulberg's Team
Dividend Yield**



**Robert Stulberg's Team
Stock Price**



Source: Tiburon Research & Analysis

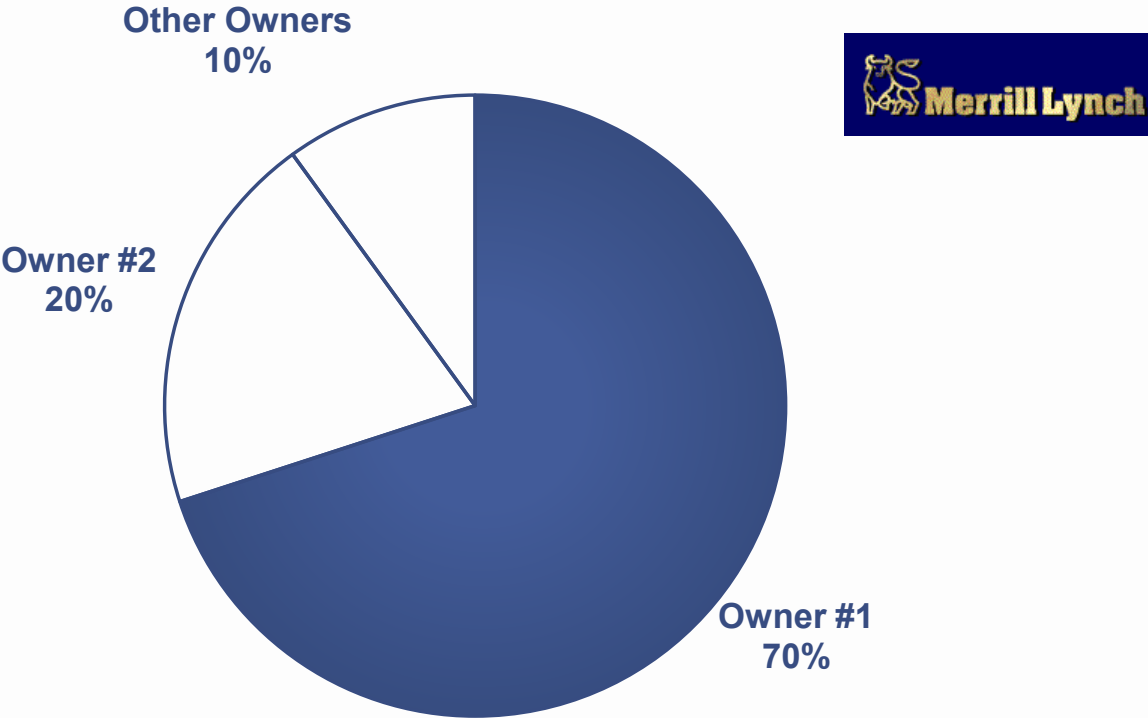
**Robert Stulberg's Team
Shares Outstanding**



**Robert Stulberg's Team
Market Capitalization
(\$ Millions)**



**Robert Stulberg's Team
Ownership
By Owner**



Source: Tiburon Research & Analysis

Robert Stulberg's Team's Stock Volume is....

**Robert Stulberg's Team
Stock Volume**



Source: Tiburon Research & Analysis



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