

Sharon Oberlander's Team

A Leading Broker at Merrill
Lynch

Tiburon Written Research
December 28, 2018



TIBURON STRATEGIC ADVISORS

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

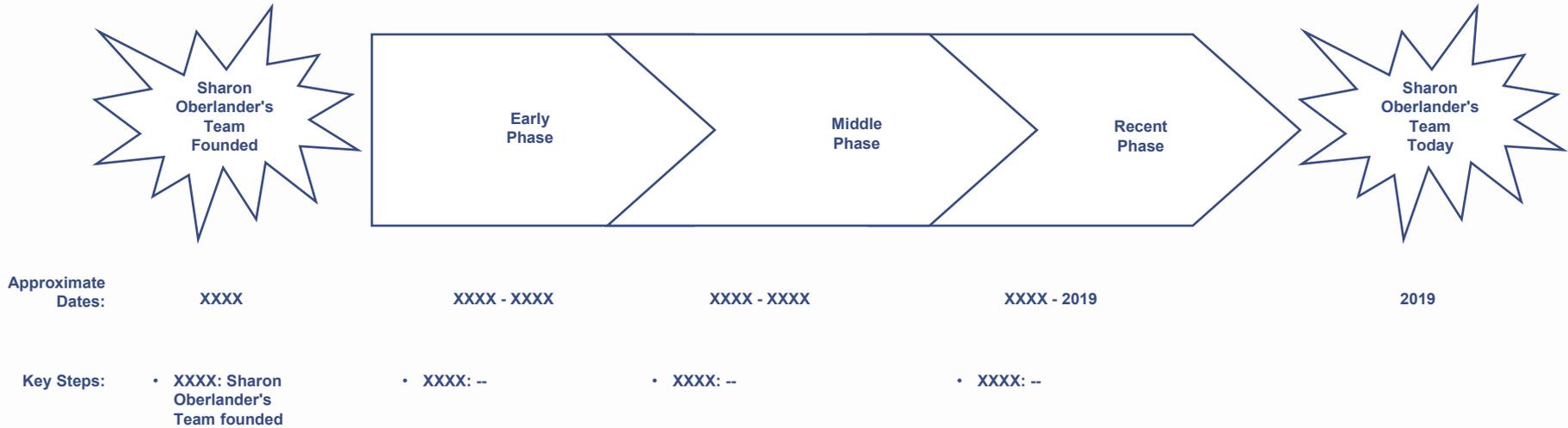
Comments

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



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

Sharon Oberlander's Team History



Sharon Oberlander's Team was Founded in XXXX

Comments

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



Sharon Oberlander's Team is Not a Frequent Advertiser

Advertising

Comments

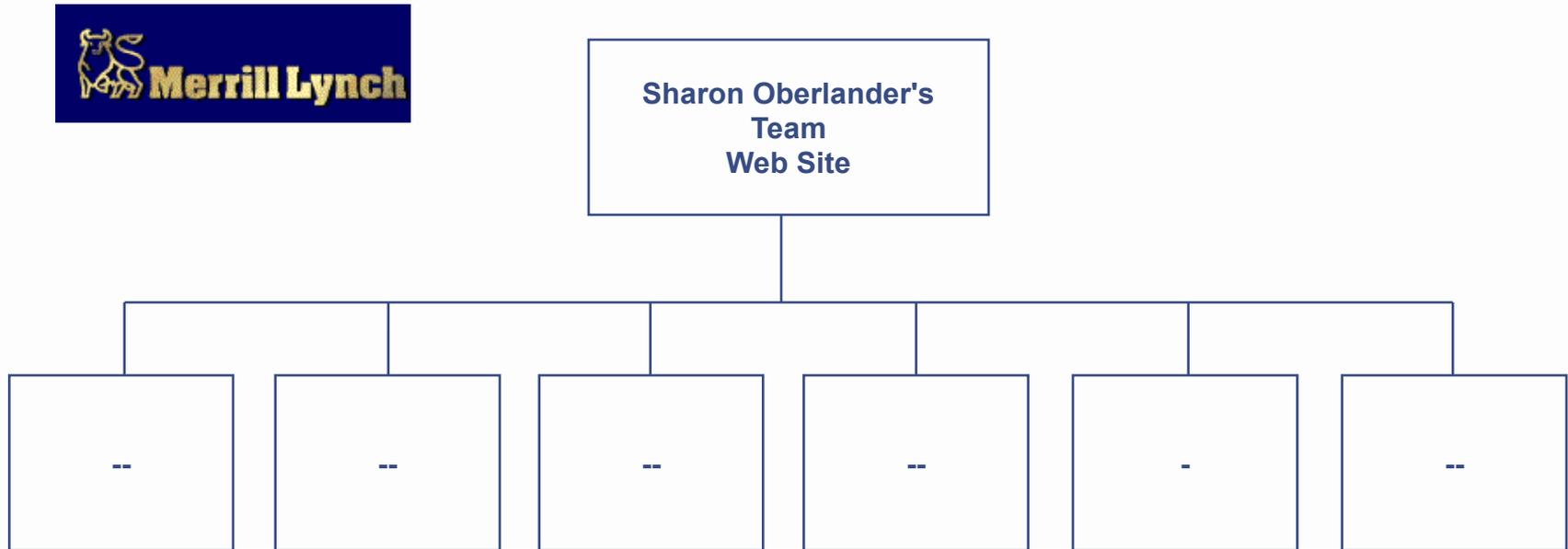
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Source: Tiburon Research & Analysis

Sharon Oberlander's Team Has a Web Site with XXXX Core Sections, Including _____

Sharon Oberlander's Team Web Site



Sharon Oberlander's Team Has a Charitable Giving Program

Charitable Giving

Comments

- --



Sharon Oberlander's Team is Not a Frequent Acquirer

Acquisitions

Comments

- --



Source: Tiburon Research & Analysis

Sharon Oberlander's Team Has Employees

Sharon Oberlander's Team Employees



Source: Tiburon Research & Analysis

Sharon Oberlander's Team Serves Clients

Needs data

Sharon Oberlander's Team Clients



Source: Tiburon Research & Analysis

Sharon Oberlander's Team Has Gathered Accounts

Needs data

Sharon Oberlander's Team Accounts



Source: Tiburon Research & Analysis

Sharon Oberlander's Team Has an \$___ Average Account Size

Needs data

Sharon Oberlander's Team Average Account Size



Source: Tiburon Research & Analysis

Sharon Oberlander's Team Has Gathered Assets Under Administration

Needs data

Sharon Oberlander's Team Assets Under Administration (\$ Millions)



2017

2018

Sharon Oberlander's Team Generates Revenues

Needs data

Sharon Oberlander's Team Revenues (\$ Millions)



Source: Tiburon Research & Analysis

Sharon Oberlander's Team Earns \$___ Million

Needs data

Sharon Oberlander's Team Net Profits (\$ Millions)



Source: Tiburon Research & Analysis

Sharon Oberlander's Team's First Service is ____

Comments

- --



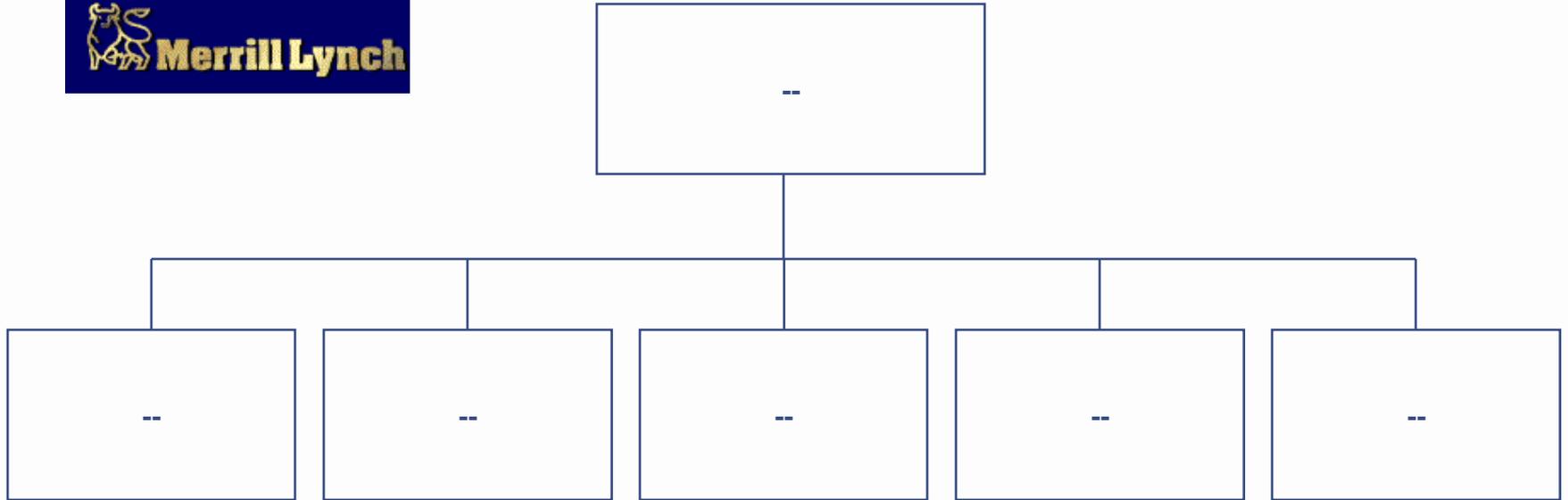
Sharon Oberlander's Team's Second Service is ____

Comments

- --



Sharon Oberlander's Team Organizational Chart



Sharon Oberlander's Team Has a Board of Directors Led by its Chairman...

Sharon Oberlander's Team Board of Directors

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

Comments

- --



Sharon Oberlander's Team Has Assets

Needs data

Sharon Oberlander's Team Assets (\$ Millions)



2017

2018

Sharon Oberlander's Team Has Liabilities

Needs data

Sharon Oberlander's Team Liabilities (\$ Millions)



2017

2018

Sharon Oberlander's Team Has Shareholders' Equity

Needs data

Sharon Oberlander's Team Shareholders Equity (\$ Millions)



Source: Tiburon Research & Analysis

Sharon Oberlander's Team Earns ... Per Share

Needs data

Sharon Oberlander's Team Earnings Per Share



Source: Tiburon Research & Analysis

Sharon Oberlander's Team Declares ... Dividends Per Share

Needs data

Sharon Oberlander's Team Dividends Per Share



Source: Tiburon Research & Analysis

Sharon Oberlander's Team Has a ... Dividend Yield

Needs data

Sharon Oberlander's Team Dividend Yield



Source: Tiburon Research & Analysis

Needs data

Sharon Oberlander's Team Stock Price



2017

2018

Sharon Oberlander's Team Has ... Shares Outstanding

Needs data

Sharon Oberlander's Team Shares Outstanding



Source: Tiburon Research & Analysis

Sharon Oberlander's Team's Market Capitalization is ...

Needs data

Sharon Oberlander's Team Market Capitalization (\$ Millions)

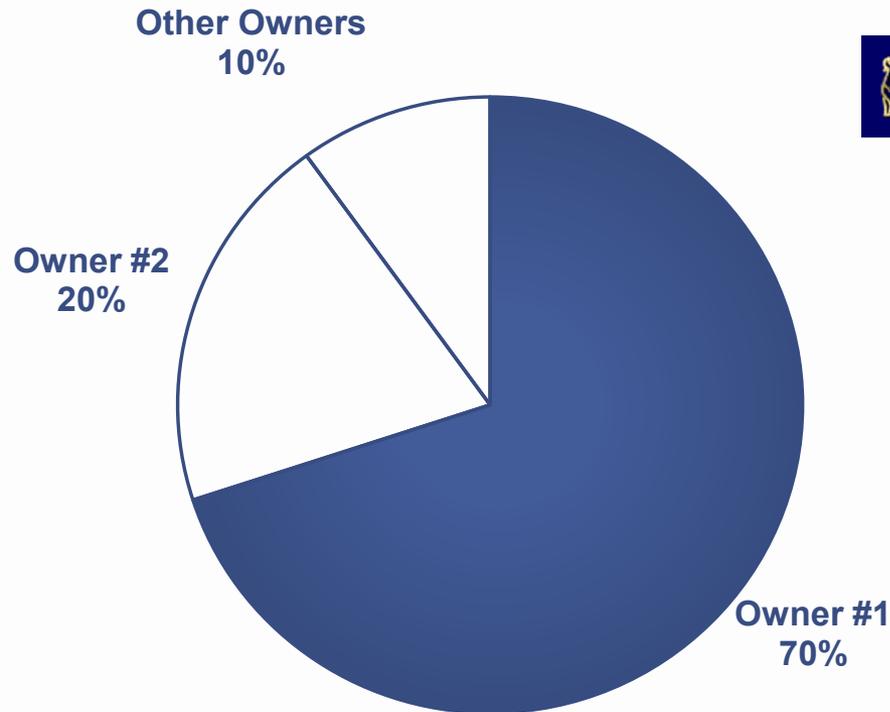


2017

2018

Needs data

Sharon Oberlander's Team Ownership By Owner



Sharon Oberlander's Team's Stock Volume is....

Needs data

Sharon Oberlander's Team Stock Volume



Source: Tiburon Research & Analysis



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