



# TIBURON STRATEGIC ADVISORS

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

## *Financial Advisor Profiles Series*

### Sherpa Financial Services: A Hockessin, DE Independent Advisor

---

(Table of Contents)



*September 9, 2022*

## **TABLE OF CONTENTS**

History.....	
Early Phase .....	
Middle Phase.....	
Recent Phase .....	
Statistics.....	
Offices .....	
Employees .....	
Clients .....	
Accounts .....	
Average Account Size .....	
Assets Under Management .....	
Revenues .....	
Net Profits.....	
Services .....	
Retirement.....	
Investment.....	
Estate .....	
Insurance.....	
Tax .....	
Money .....	
Lifestyle .....	
Organization & Ownership.....	
Organizational Structure .....	
Organizational Chart .....	
Board of Directors .....	
Ownership .....	
Assets .....	
Liabilities .....	
Shareholder Equity.....	
Earnings Per Share.....	
Dividends Per Share .....	
Dividend Yield .....	
Stock Price.....	
Shares Outstanding .....	
Market Capitalization.....	
Ownership by Owner.....	
Stock Volume.....	