

# Stephanie Twomey's Team

A Leading Broker at Merrill  
Lynch

Tiburon Written Research  
January 19, 2019



**TIBURON STRATEGIC ADVISORS**

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

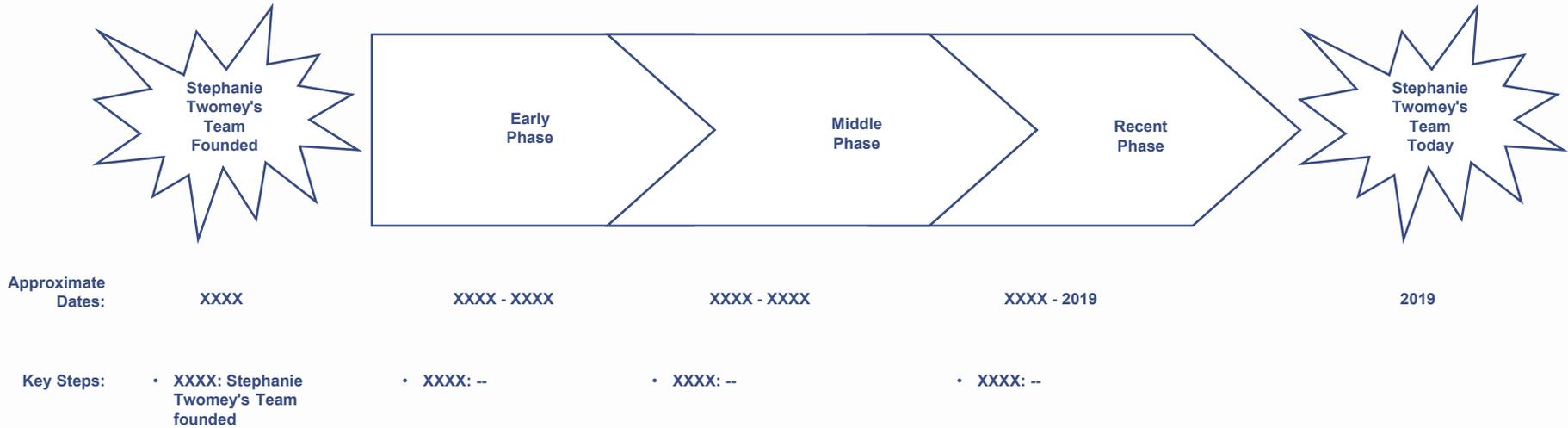
**Comments**

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



# Stephanie Twomey's Team was Founded in XXXX and Has Subsequently Evolved through its Early, Middle, & Recent Phases

## Stephanie Twomey's Team History



# Stephanie Twomey's Team was Founded in XXXX

---

## Comments

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



# Stephanie Twomey's Team is Not a Frequent Advertiser

Advertising

## Comments

- --

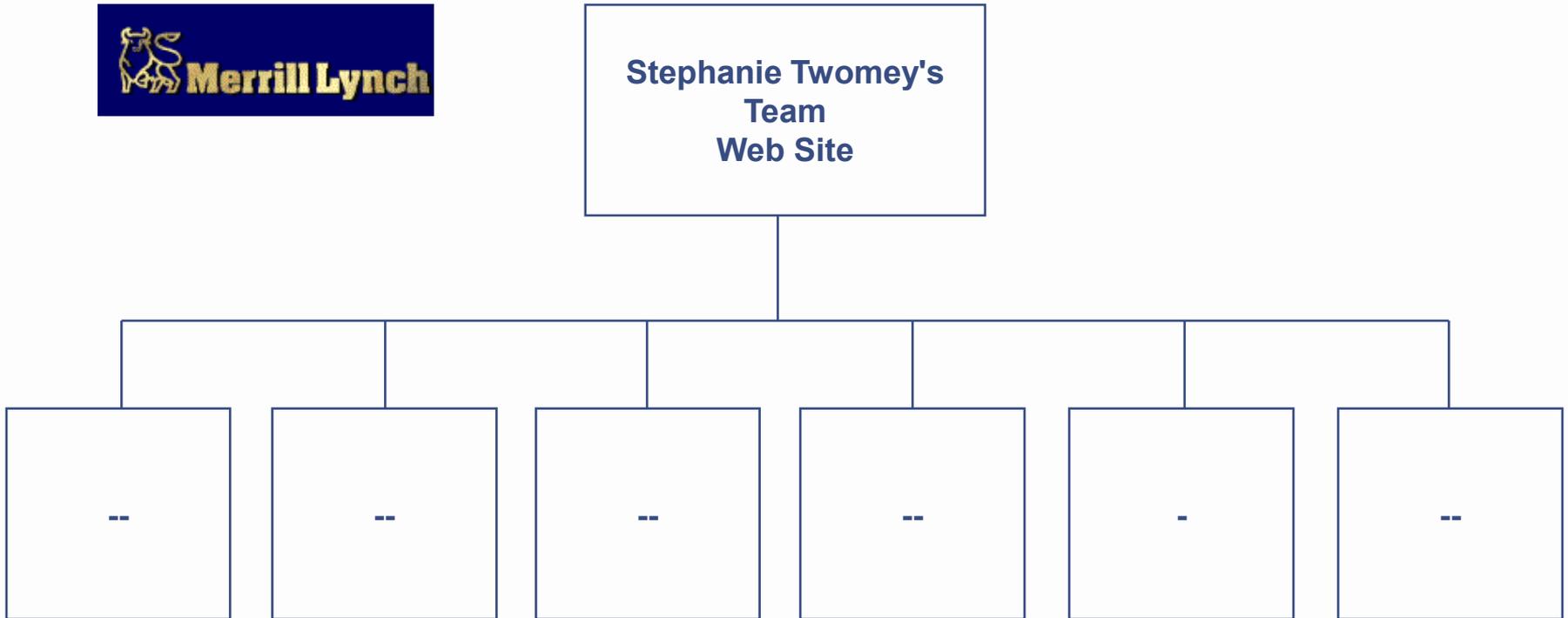


Source: Tiburon Research & Analysis

# Stephanie Twomey's Team Has a Web Site with XXXX Core Sections, Including \_\_\_\_\_

---

## Stephanie Twomey's Team Web Site



# Stephanie Twomey's Team Has a Charitable Giving Program

Charitable Giving

## Comments

- --



Source: Tiburon Research & Analysis

# Stephanie Twomey's Team is Not a Frequent Acquirer

Acquisitions

## Comments

- --



Source: Tiburon Research & Analysis

# Stephanie Twomey's Team Has Employees

---

## Stephanie Twomey's Team Employees



Source: Tiburon Research & Analysis

# Stephanie Twomey's Team Serves Clients

Needs data

## Stephanie Twomey's Team Clients



Source: Tiburon Research & Analysis

# Stephanie Twomey's Team Has Gathered Accounts

Needs data

## Stephanie Twomey's Team Accounts



Source: Tiburon Research & Analysis

# Stephanie Twomey's Team Has an \$\_\_\_ Average Account Size

Needs data

## Stephanie Twomey's Team Average Account Size



Source: Tiburon Research & Analysis

# Stephanie Twomey's Team Has Gathered Assets Under Administration

---

Needs data

## Stephanie Twomey's Team Assets Under Administration (\$ Millions)



2017

2018

# Stephanie Twomey's Team Generates Revenues

Needs data

## Stephanie Twomey's Team Revenues (\$ Millions)



Source: Tiburon Research & Analysis

# Stephanie Twomey's Team Earns \$\_\_\_ Million

Needs data

## Stephanie Twomey's Team Net Profits (\$ Millions)



Source: Tiburon Research & Analysis

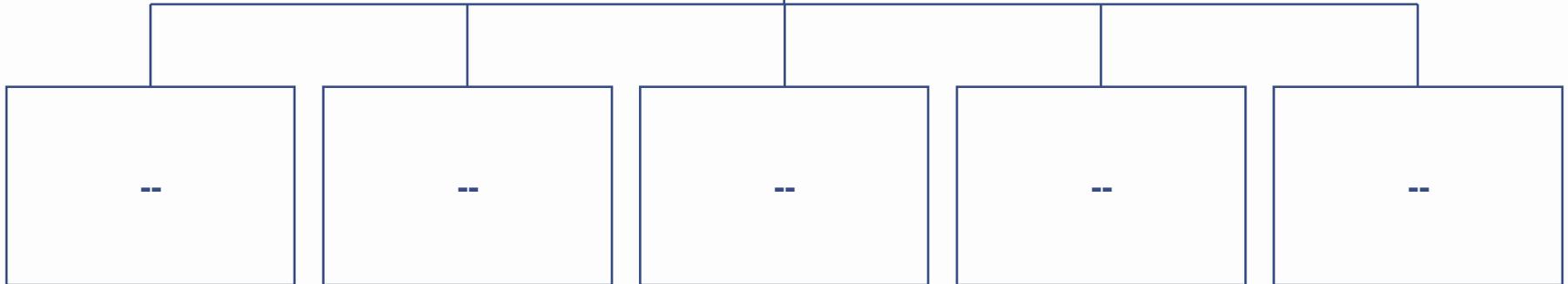
# ***Stephanie Twomey's Team Provides a Number of Services, Including...***

---

## **Stephanie Twomey's Team Services**



**Stephanie Twomey's  
Team  
Services**



# Stephanie Twomey's Team's First Service is \_\_\_\_

---

## Comments

- --



# Stephanie Twomey's Team's Second Service is \_\_\_\_

---

## Comments

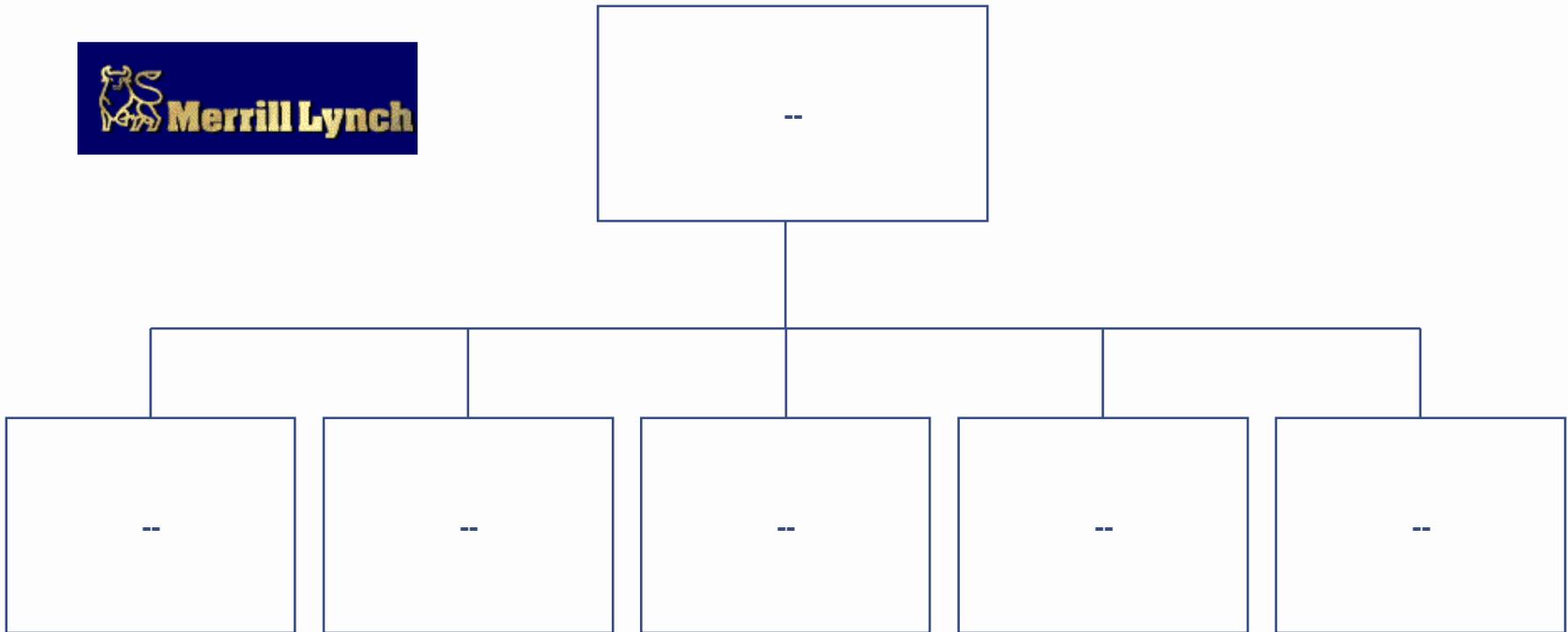
- --



# Stephanie Twomey's Team is Led by ...

---

## Stephanie Twomey's Team Organizational Chart



# Stephanie Twomey's Team Has a Board of Directors Led by its Chairman...

---

## Stephanie Twomey's Team Board of Directors

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

# Stephanie Twomey's Team is Privately Owned

---

## Comments

- --



# Stephanie Twomey's Team Has Assets

Needs data

## Stephanie Twomey's Team Assets (\$ Millions)



2017 2018

Source: Tiburon Research & Analysis

# Stephanie Twomey's Team Has Liabilities

Needs data

## Stephanie Twomey's Team Liabilities (\$ Millions)



2017 2018

Source: Tiburon Research & Analysis

# Stephanie Twomey's Team Has Shareholders' Equity

Needs data

## Stephanie Twomey's Team Shareholders Equity (\$ Millions)



2017 2018

Source: Tiburon Research & Analysis

# Stephanie Twomey's Team Earns ... Per Share

Needs data

## Stephanie Twomey's Team Earnings Per Share



Source: Tiburon Research & Analysis

# Stephanie Twomey's Team Declares ... Dividends Per Share

Needs data

## Stephanie Twomey's Team Dividends Per Share



Source: Tiburon Research & Analysis

# Stephanie Twomey's Team Has a ... Dividend Yield

Needs data

## Stephanie Twomey's Team Dividend Yield



Source: Tiburon Research & Analysis

# Stephanie Twomey's Team's Stock Price is ...

---

Needs data

## Stephanie Twomey's Team Stock Price



Source: Tiburon Research & Analysis

# Stephanie Twomey's Team Has ... Shares Outstanding

Needs data

## Stephanie Twomey's Team Shares Outstanding



Source: Tiburon Research & Analysis

# Stephanie Twomey's Team's Market Capitalization is ...

Needs data

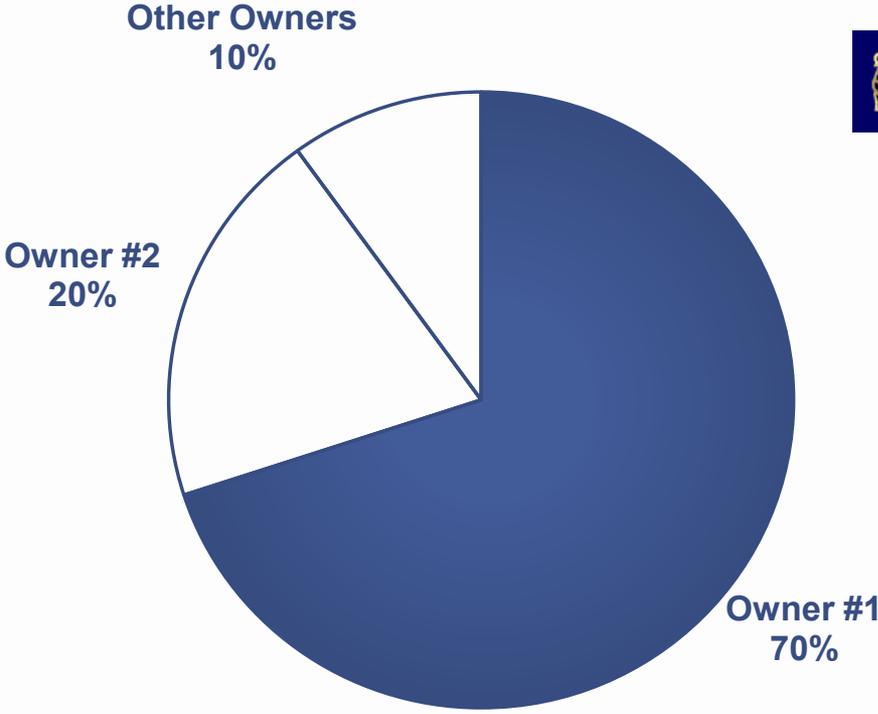
## Stephanie Twomey's Team Market Capitalization (\$ Millions)



Source: Tiburon Research & Analysis

Needs data

## Stephanie Twomey's Team Ownership By Owner



# Stephanie Twomey's Team's Stock Volume is....

---

Needs data

## Stephanie Twomey's Team Stock Volume



Source: Tiburon Research & Analysis



## **TIBURON STRATEGIC ADVISORS**

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