

Stephanie Twomey's Team

A Leading Broker at Merrill Lynch

Tiburon Written Research
January 19, 2019



TIBURON STRATEGIC ADVISORS

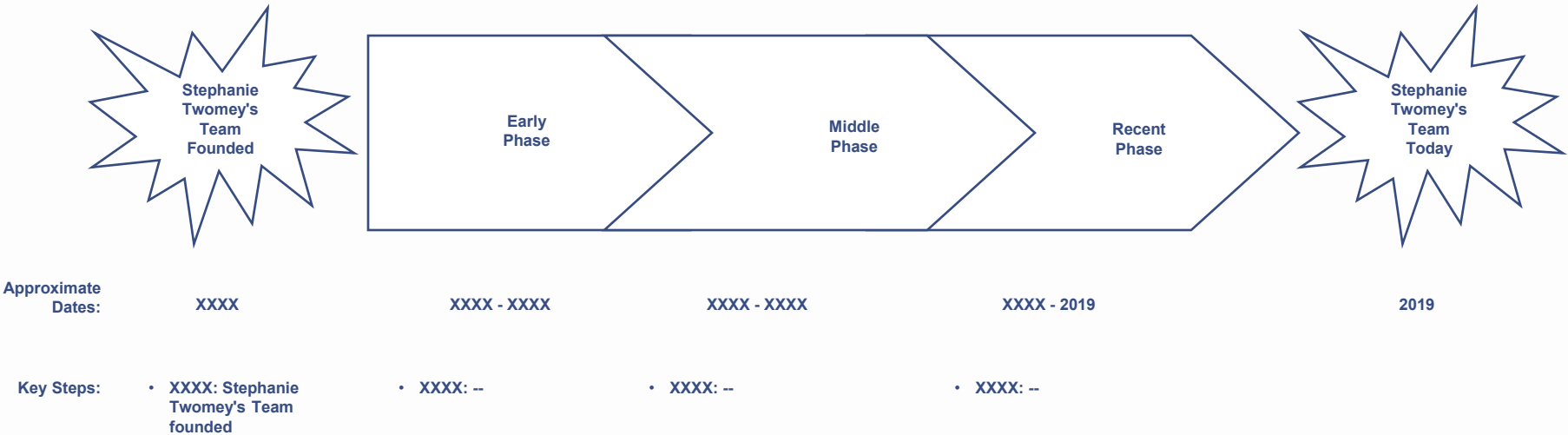
Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (& WealthTech) Firms



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



Source: Tiburon Research & Analysis

Stephanie Twomey's Team was Founded in XXXX



Comments
• Founded in XXXX • Based in XXXX

Source: Tiburon Research & Analysis

Stephanie Twomey's Team is Not a Frequent Advertiser

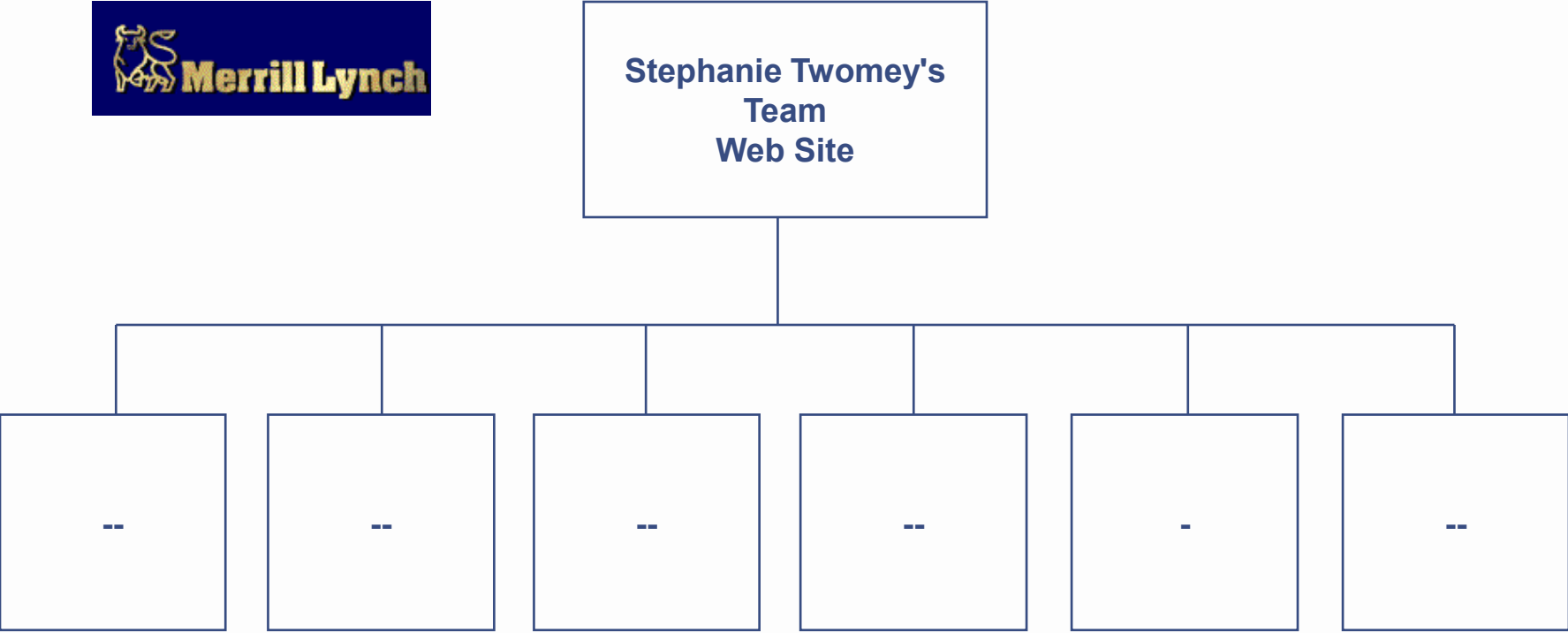


Comments	
•	--

Source: Tiburon Research & Analysis

Stephanie Twomey's Team Has a Web Site with XXXX Core Sections, Including _____

**Stephanie Twomey's Team
Web Site**



Source: Tiburon Research & Analysis

Stephanie Twomey's Team Has a Charitable Giving Program



Comments
--

Source: Tiburon Research & Analysis

Stephanie Twomey's Team is Not a Frequent Acquirer



Comments
--

Source: Tiburon Research & Analysis

**Stephanie Twomey's Team
Employees**



Stephanie Twomey's Team
Clients



Source: Tiburon Research & Analysis

**Stephanie Twomey's Team
Accounts**



Source: Tiburon Research & Analysis

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

**Stephanie Twomey's Team
Average Account Size**



Source: Tiburon Research & Analysis

Stephanie Twomey's Team Has Gathered Assets Under Administration

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



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



Source: Tiburon Research & Analysis

Stephanie Twomey's Team Earns \$____ Million

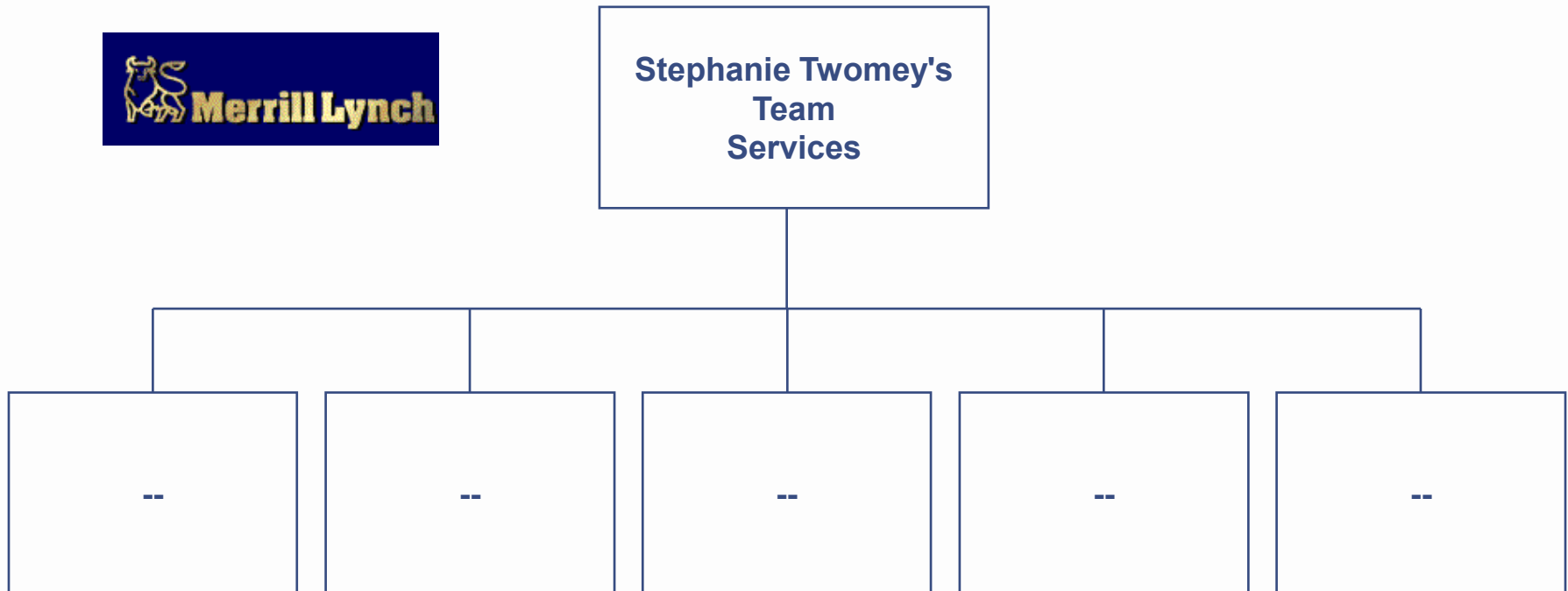
**Stephanie Twomey's Team
Net Profits
(\$ Millions)**



Source: Tiburon Research & Analysis

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

Stephanie Twomey's Team Services



Stephanie Twomey's Team's First Service is ____

Comments

- --



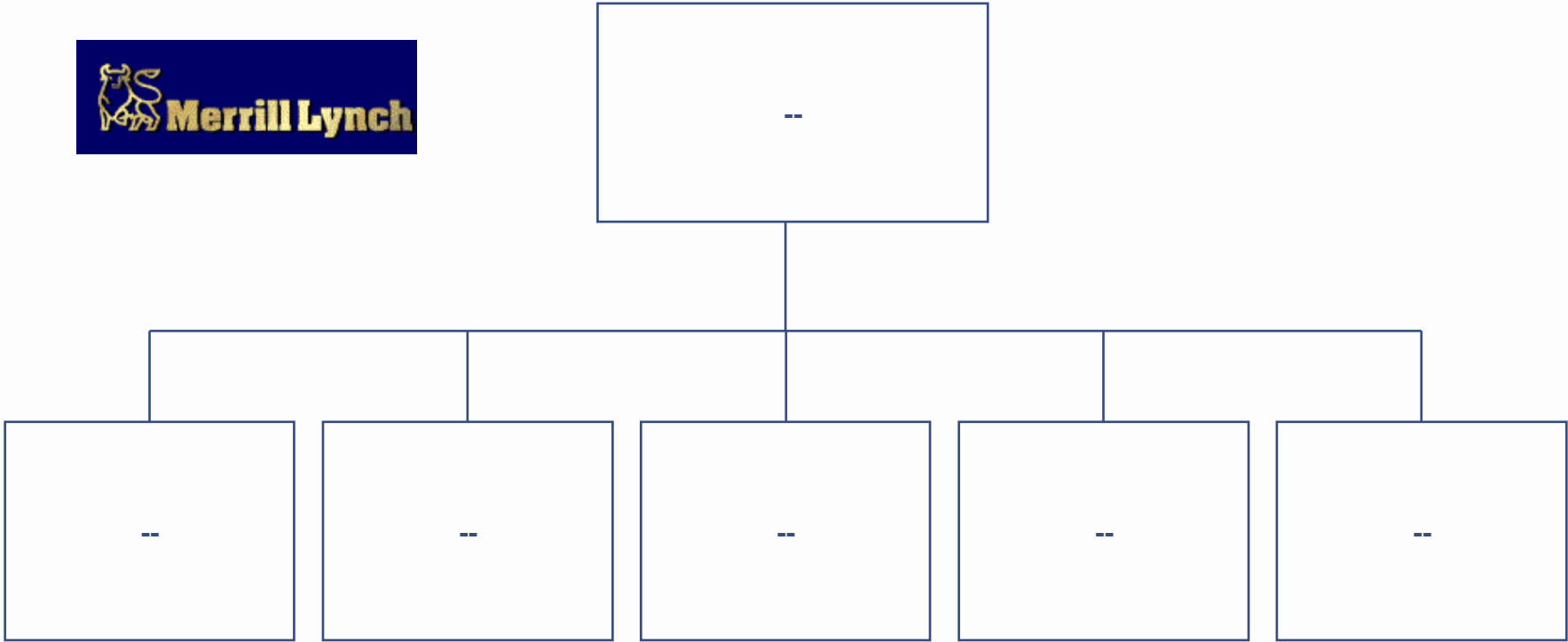
Stephanie Twomey's Team's Second Service is ____



Comments
--

Source: Tiburon Research & Analysis

Stephanie Twomey's Team
Organizational Chart



Source: Tiburon Research & Analysis

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

**Stephanie Twomey's Team
Board of Directors**

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

Source: Tiburon Research & Analysis



Comments
--

Stephanie Twomey's Team
Assets
(\$ Millions)



Source: Tiburon Research & Analysis

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



Source: Tiburon Research & Analysis

Stephanie Twomey's Team Has Shareholders' Equity

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



2017 2018

Stephanie Twomey's Team Earns ... Per Share

Stephanie Twomey's Team Earnings Per Share



Source: Tiburon Research & Analysis

**Stephanie Twomey's Team
Dividends Per Share**



Source: Tiburon Research & Analysis

**Stephanie Twomey's Team
Dividend Yield**



Source: Tiburon Research & Analysis

Stephanie Twomey's Team
Stock Price



Source: Tiburon Research & Analysis

Stephanie Twomey's Team Has ... Shares Outstanding

Stephanie Twomey's Team Shares Outstanding



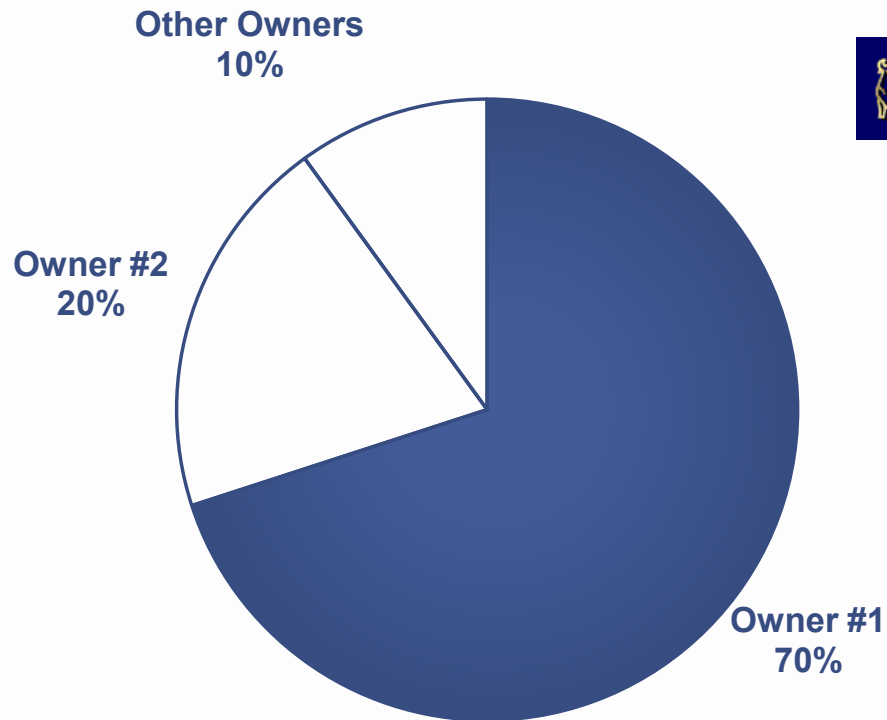
Source: Tiburon Research & Analysis

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



Stephanie Twomey's Team is Owned by

Stephanie Twomey's Team Ownership By Owner



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

**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