

Susan Rosenthal's Team

A Leading Broker at Merrill
Lynch

Tiburon Written Research
December 29, 2018



TIBURON STRATEGIC ADVISORS

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

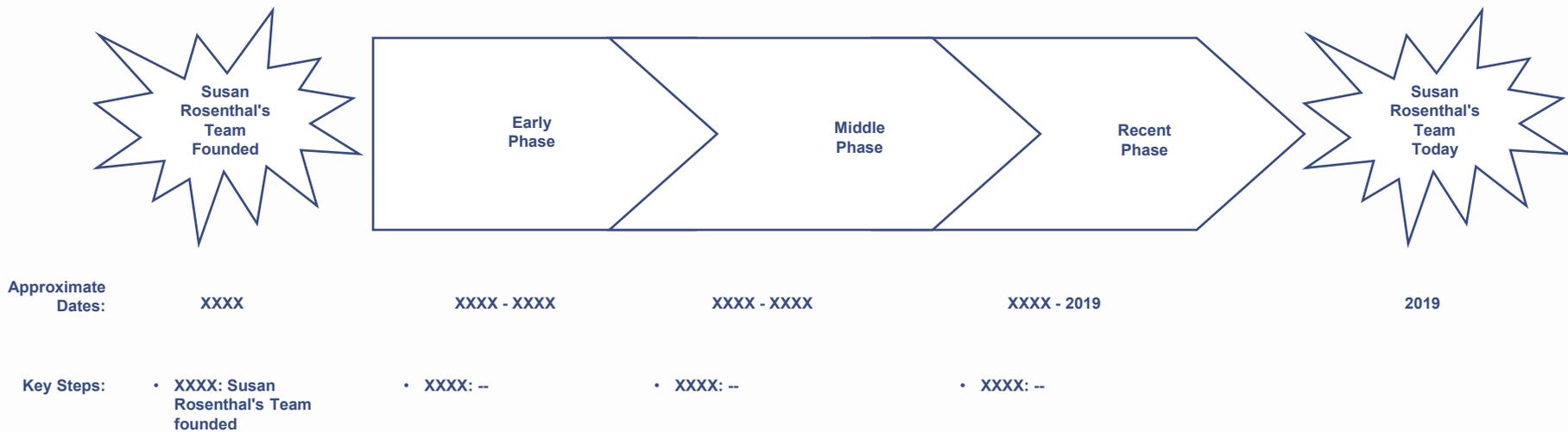
Comments

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



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

Susan Rosenthal's Team History



Susan Rosenthal's Team was Founded in XXXX

Comments

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



Susan Rosenthal's Team is Not a Frequent Advertiser

Advertising

Comments

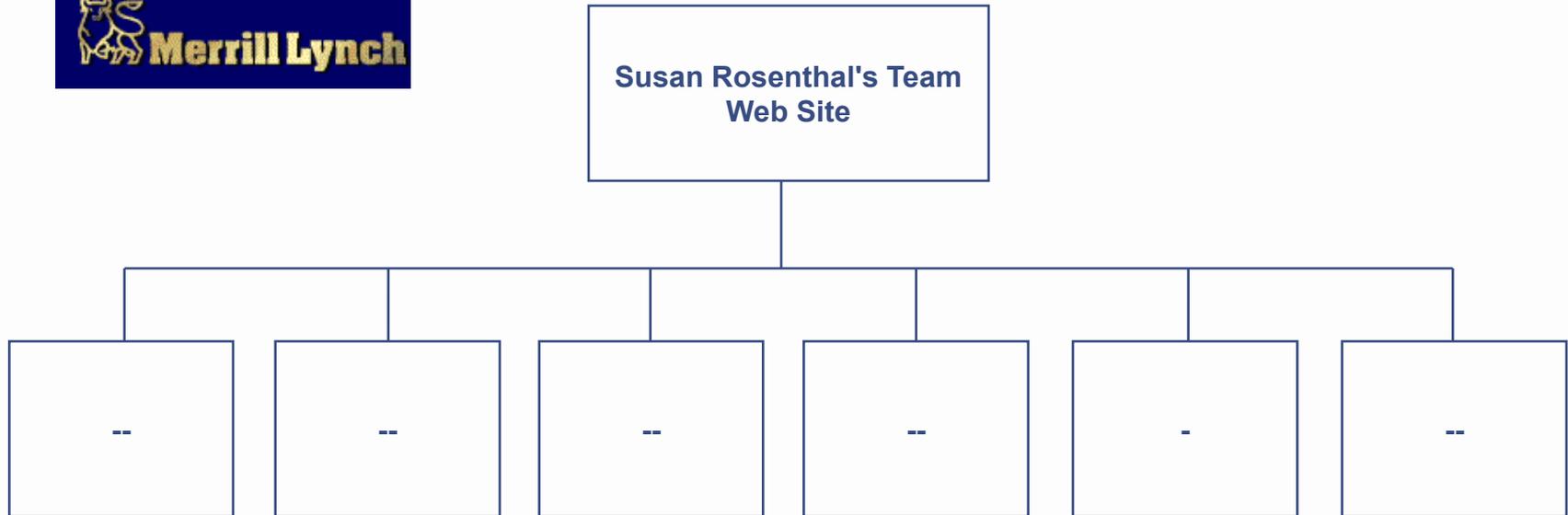
- --



Source: Tiburon Research & Analysis

Susan Rosenthal's Team Has a Web Site with XXXX Core Sections, Including _____

Susan Rosenthal's Team Web Site



Susan Rosenthal's Team Has a Charitable Giving Program

Charitable Giving

Comments

- --



Susan Rosenthal's Team is Not a Frequent Acquirer

Acquisitions

Comments

- --



Source: Tiburon Research & Analysis

Susan Rosenthal's Team Has Employees

Susan Rosenthal's Team Employees



Source: Tiburon Research & Analysis

Susan Rosenthal's Team Serves Clients

Needs data

Susan Rosenthal's Team Clients



Source: Tiburon Research & Analysis

Susan Rosenthal's Team Has Gathered Accounts

Needs data

Susan Rosenthal's Team Accounts



Source: Tiburon Research & Analysis

Susan Rosenthal's Team Has an \$___ Average Account Size

Needs data

Susan Rosenthal's Team Average Account Size



Source: Tiburon Research & Analysis

Susan Rosenthal's Team Has Gathered Assets Under Administration

Needs data

Susan Rosenthal's Team Assets Under Administration (\$ Millions)



2017

2018

Susan Rosenthal's Team Generates Revenues

Needs data

Susan Rosenthal's Team Revenues (\$ Millions)



Source: Tiburon Research & Analysis

Susan Rosenthal's Team Earns \$___ Million

Needs data

Susan Rosenthal's Team Net Profits (\$ Millions)



Source: Tiburon Research & Analysis

Susan Rosenthal's Team's First Service is ____

Comments

- --



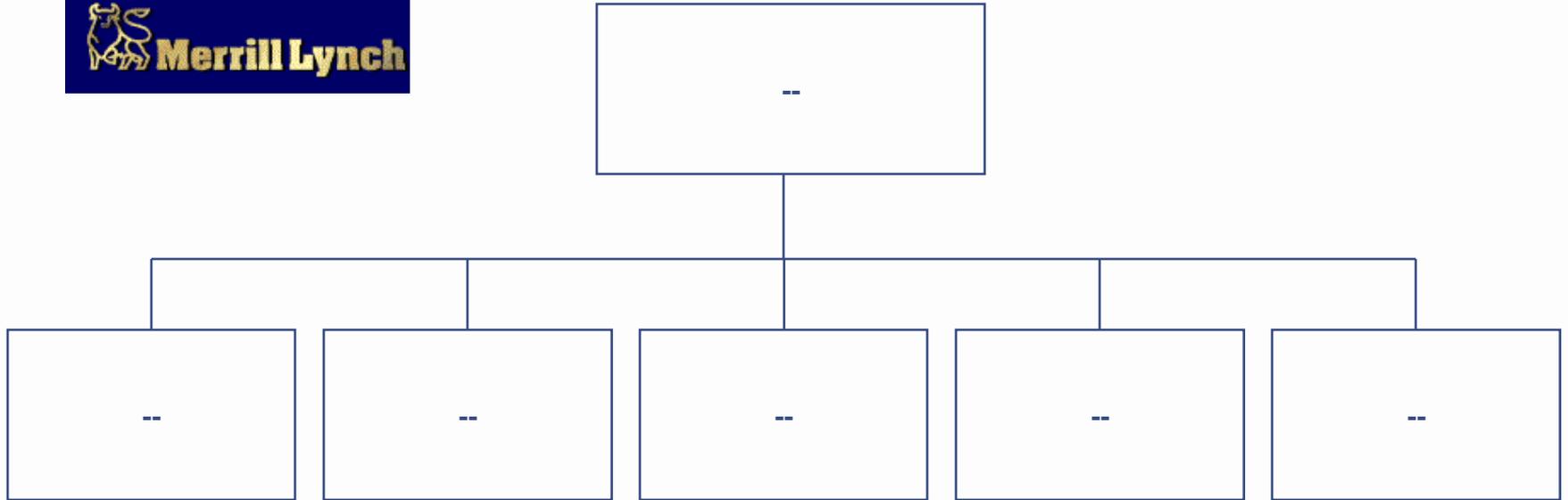
Susan Rosenthal's Team's Second Service is ____

Comments

- --



Susan Rosenthal's Team Organizational Chart



Susan Rosenthal's Team Has a Board of Directors Led by its Chairman...

Susan Rosenthal's Team Board of Directors

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

Susan Rosenthal's Team is Privately Owned

Comments

- --



Susan Rosenthal's Team Has Assets

Needs data

Susan Rosenthal's Team Assets (\$ Millions)



2017 2018

Source: Tiburon Research & Analysis

Susan Rosenthal's Team Has Liabilities

Needs data

Susan Rosenthal's Team Liabilities (\$ Millions)



2017 2018

Source: Tiburon Research & Analysis

Susan Rosenthal's Team Has Shareholders' Equity

Needs data

Susan Rosenthal's Team Shareholders Equity (\$ Millions)



Source: Tiburon Research & Analysis

Susan Rosenthal's Team Earns ... Per Share

Needs data

Susan Rosenthal's Team Earnings Per Share



Source: Tiburon Research & Analysis

Susan Rosenthal's Team Declares ... Dividends Per Share

Needs data

Susan Rosenthal's Team Dividends Per Share



2017

2018

Susan Rosenthal's Team Has a ... Dividend Yield

Needs data

Susan Rosenthal's Team Dividend Yield



Source: Tiburon Research & Analysis

Susan Rosenthal's Team's Stock Price is ...

Needs data

Susan Rosenthal's Team Stock Price



Source: Tiburon Research & Analysis

Susan Rosenthal's Team Has ... Shares Outstanding

Needs data

Susan Rosenthal's Team Shares Outstanding



Source: Tiburon Research & Analysis

Susan Rosenthal's Team's Market Capitalization is ...

Needs data

Susan Rosenthal's Team Market Capitalization (\$ Millions)



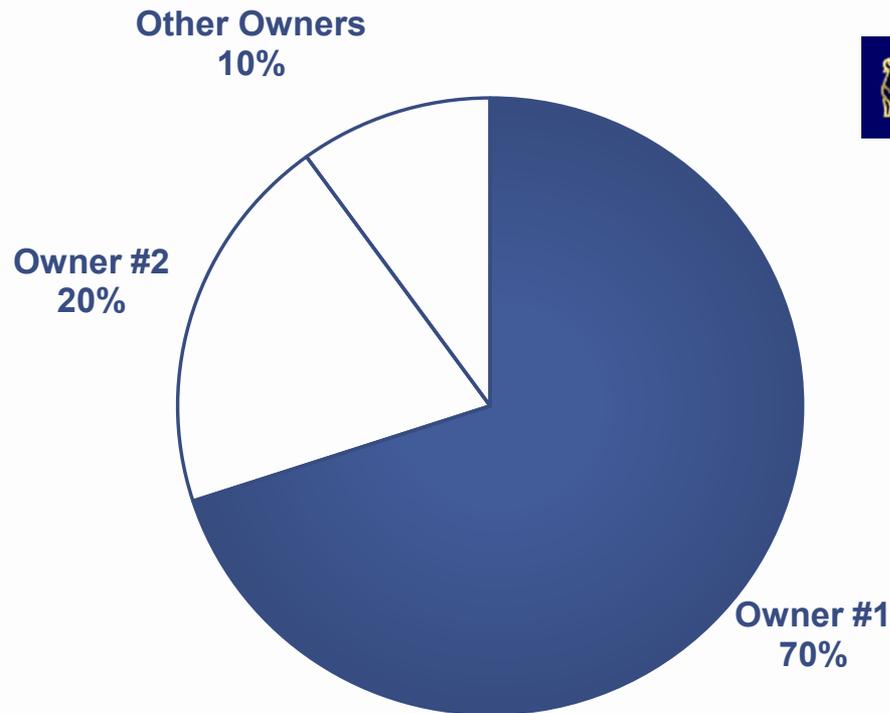
2017

2018

Susan Rosenthal's Team is Owned by

Needs data

Susan Rosenthal's Team Ownership By Owner



Susan Rosenthal's Team's Stock Volume is....

Needs data

Susan Rosenthal's Team Stock Volume



Source: Tiburon Research & Analysis



TIBURON STRATEGIC ADVISORS

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