

Theresa Ward's Team

A Leading Broker at Merrill
Lynch

Tiburon Written Research
February 2, 2019



TIBURON STRATEGIC ADVISORS

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

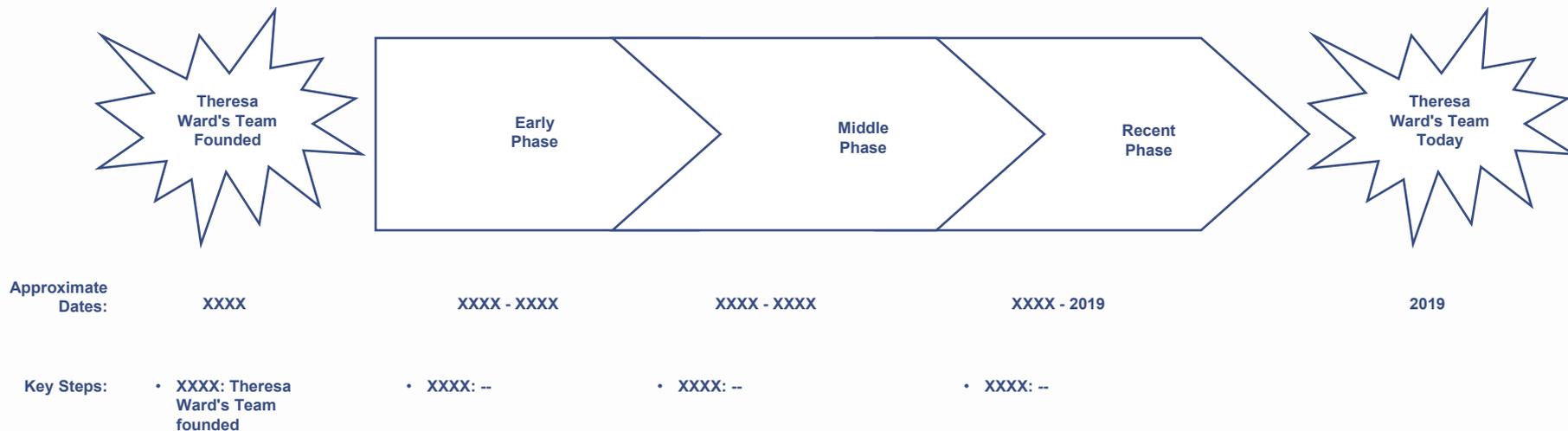
Comments

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



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

Theresa Ward's Team History



Comments

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



Theresa Ward's Team is Not a Frequent Advertiser

Advertising

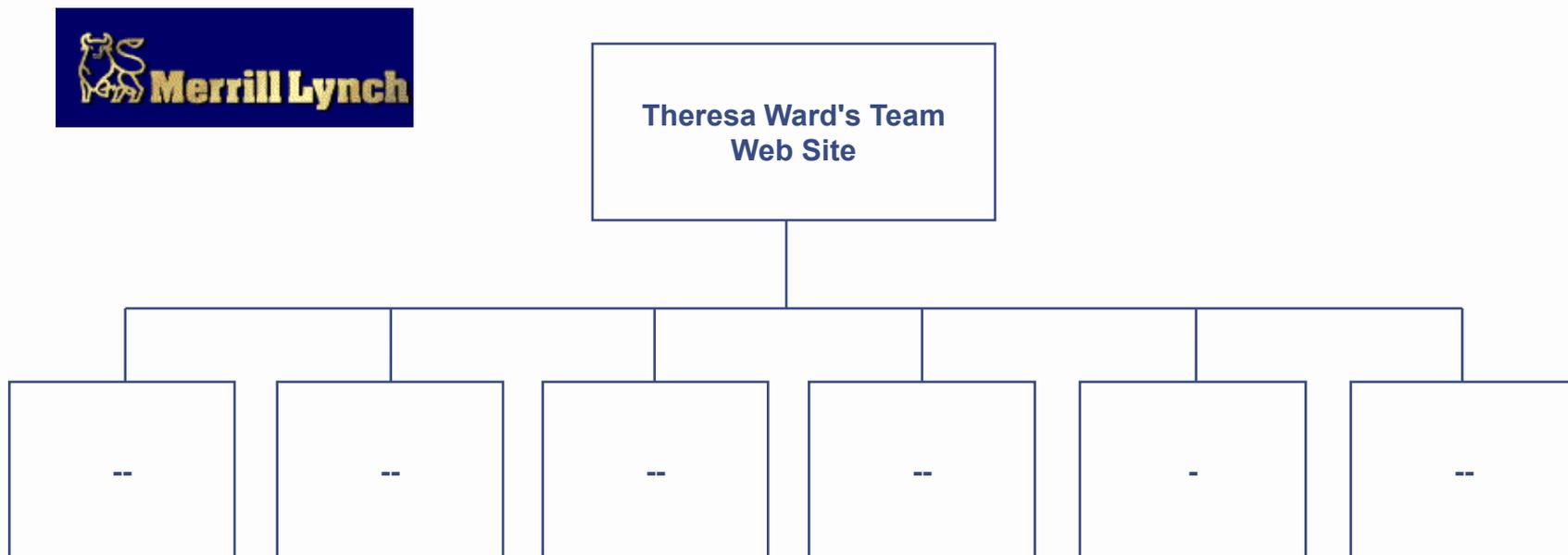
Comments

- --



Theresa Ward's Team Has a Web Site with XXXX Core Sections, Including _____

Theresa Ward's Team Web Site



Theresa Ward's Team Has a Charitable Giving Program

Charitable
Giving

Comments

- --



Theresa Ward's Team is Not a Frequent Acquirer

Acquisitions

Comments

- --



Theresa Ward's Team Employees



Needs data

Theresa Ward's Team Clients



2017 2018

Theresa Ward's Team Has Gathered Accounts

Needs data

Theresa Ward's Team Accounts



2017

2018

Theresa Ward's Team Has an \$___ Average Account Size

Needs data

Theresa Ward's Team Average Account Size



2017

2018

Theresa Ward's Team Has Gathered Assets Under Administration

Needs data

Theresa Ward's Team Assets Under Administration (\$ Millions)



2017

2018

Theresa Ward's Team Generates Revenues

Needs data

Theresa Ward's Team Revenues (\$ Millions)



2017 2018

Theresa Ward's Team Earns \$___ Million

Needs data

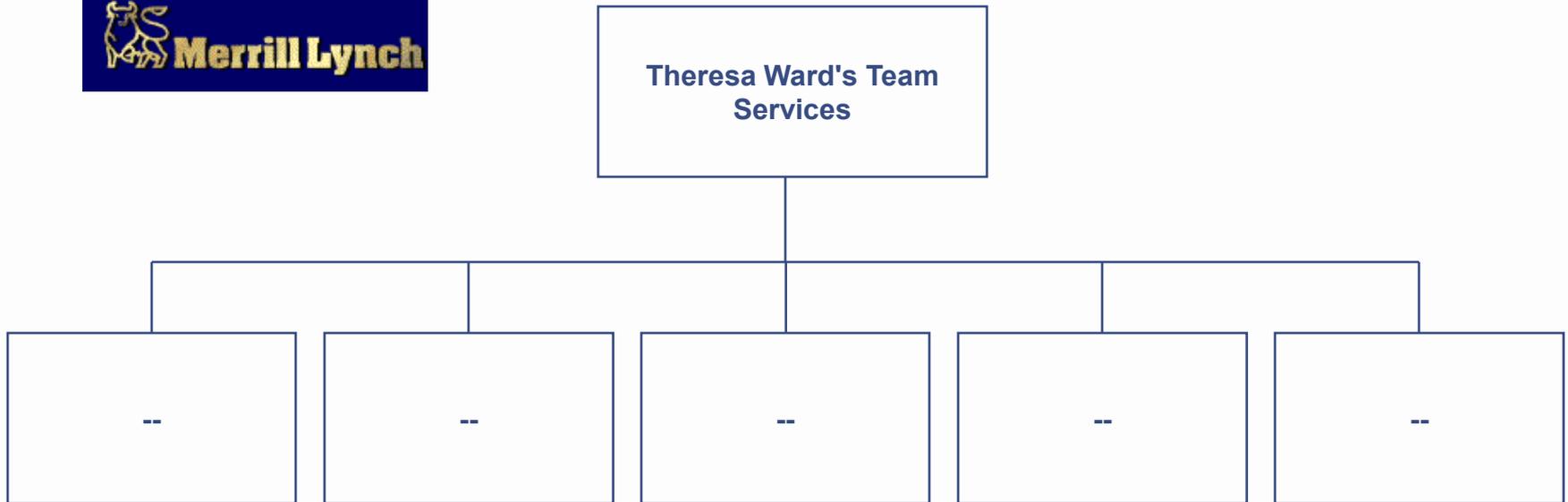
Theresa Ward's Team Net Profits (\$ Millions)



2017

2018

Theresa Ward's Team Services



Theresa Ward's Team's First Service is ____

Comments

- --



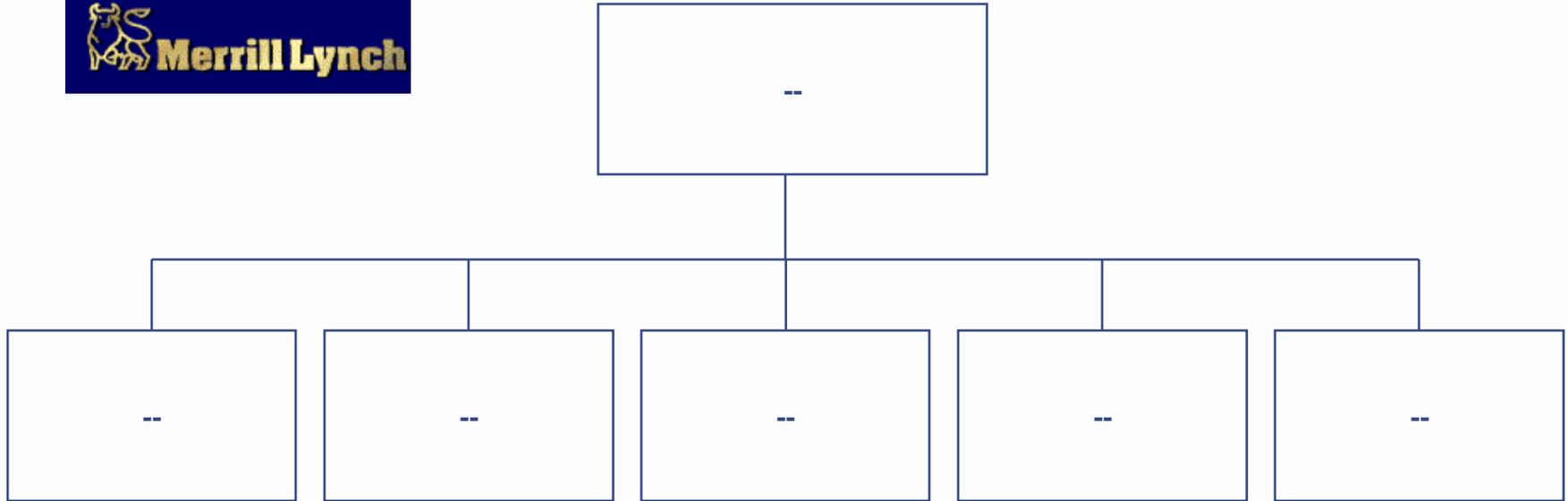
Theresa Ward's Team's Second Service is ____

Comments

- --



Theresa Ward's Team Organizational Chart



Theresa Ward's Team Has a Board of Directors Led by its Chairman...

Theresa Ward's Team Board of Directors

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

Theresa Ward's Team is Privately Owned

Comments

- --



Theresa Ward's Team Has Assets

Needs data

Theresa Ward's Team Assets (\$ Millions)



2017

2018

Theresa Ward's Team Has Liabilities

Needs data

Theresa Ward's Team Liabilities (\$ Millions)



2017

2018

Theresa Ward's Team Has Shareholders' Equity

Needs data

Theresa Ward's Team Shareholders Equity (\$ Millions)



2017

2018

Theresa Ward's Team Earns ... Per Share

Needs data

Theresa Ward's Team Earnings Per Share



Theresa Ward's Team Declares ... Dividends Per Share

Needs data

Theresa Ward's Team Dividends Per Share



2017

2018

Theresa Ward's Team Has a ... Dividend Yield

Needs data

Theresa Ward's Team Dividend Yield



2017

2018

Theresa Ward's Team's Stock Price is ...

Needs data

Theresa Ward's Team Stock Price



2017

2018

Theresa Ward's Team Has ... Shares Outstanding

Needs data

Theresa Ward's Team Shares Outstanding



Theresa Ward's Team's Market Capitalization is ...

Needs data

Theresa Ward's Team Market Capitalization (\$ Millions)



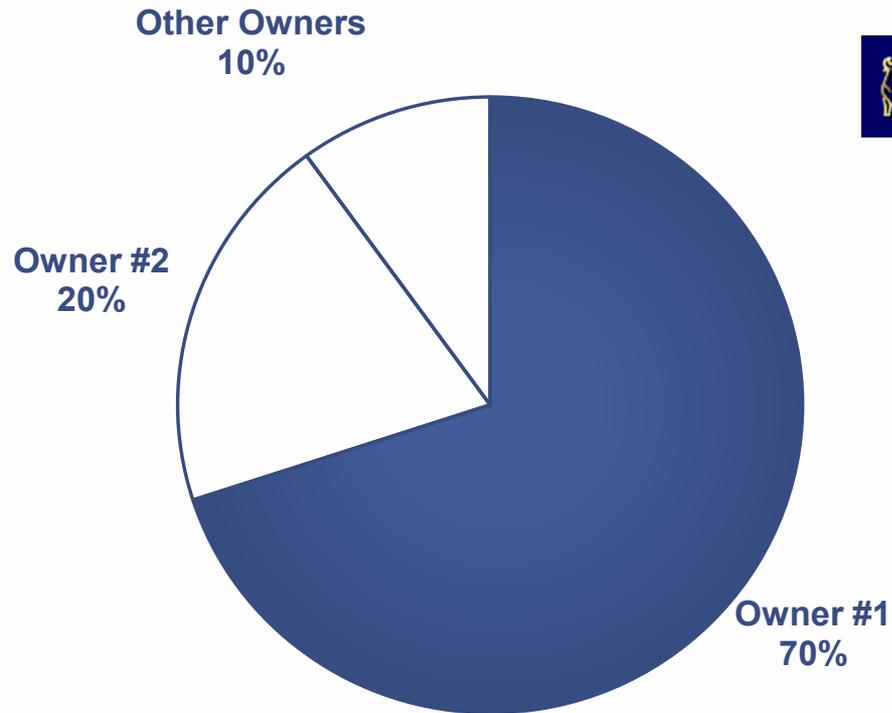
2017

2018

Theresa Ward's Team is Owned by

Needs data

Theresa Ward's Team Ownership By Owner



Theresa Ward's Team's Stock Volume is....

Needs data

Theresa Ward's Team Stock Volume



2017

2018



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