



TIBURON STRATEGIC ADVISORS

Strategy Consultants to Financial Institutions

*Financial Institutions Profiles Series*

# Wealthfront: A Leading Robo Advisor

---

(Table of Contents)



*January 25, 2017*

**TABLE OF CONTENTS**

History.....

- Early Phase.....
- Middle Phase.....
- Management Transition Phase.....

Statistics.....

- Employees.....
- Clients.....
- Accounts.....
- Net New Accounts.....
- Assets Under Management.....
- Net Flows.....
- Revenues.....
- Net Profits.....

Services.....

- Service One.....
- Service Two.....

Organization & Ownership.....

- Organizational Structure.....
  - Organizational Chart.....
  - Board of Directors.....
- Ownership.....
  - Privately Owned.....
  - Assets.....
  - Liabilities.....
  - Shareholders Equity.....
  - Earnings Per Share.....
  - Dividends Per Share.....
  - Dividend Yield.....
  - Stock Price.....
  - Shares Outstanding.....
  - Market Capitalization.....
  - Ownership by Owner.....
  - Stock Volume.....

