



# TIBURON STRATEGIC ADVISORS

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

## Financial Advisor Mergers & Acquisitions: Annual & Cumulative Transactions & Transaction Values

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- Moderate Growth in the Number of Real Estate Agents & Mortgage Brokers Mergers & Acquisitions .....
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- Independent Advisors to Surpass Insurance Agents as Most Frequent Acquisition Category.....
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Mergers & Acquisitions Transaction Values by Type.....

Mergers & Acquisitions Cumulative Transaction Values by Type .....

Secondary Market for Wirehouse & Other Captive Broker Businesses to Further  
Develop .....

Sub-Future Prediction #1 .....

Sub-Future Prediction #2 .....