



14300 N Northsight Blvd #126
Scottsdale, Arizona 85260
480 278 5930

E Mail: msmock@business-buyer-directory.com

Business Buyer Directory, LLC refers established companies for sale with > \$1MM EBITDA, all industries, for a nominal, 1% buyer paid, "success only" referral fee, paid only if purchased. There is no cost or obligation to pursue this company for sale.

=====

BENEFITS & RISK MANAGEMENT SOFTWARE FOR LARGE COMPANIES Northern California

The company has the world's only software technology stack of its kind!

Annual Revenues: \$6,950,000

Annual Cash Flow: \$2,430,000

Open to Deal Structures

This Company is a direct, national provider of planning solutions that uses proprietary high-speed data technology, service, and integrity to simplify the complex world of business benefits, financial and risk management planning.

The Company has an extensive client installs and revenue base across multiple states and has recently been asked to respond to multiple Requests for Proposal's (RFP's) that could bring internationally significant \$\$\$ revenue opportunities for the new owner or partner.

Adding to its appeal and growth potential is that any company, public, private or not-for-profit will be able to benefit from this technology and processes. Target companies (or highly compensated individuals & entrepreneurs) that derive the most benefit from the platform are enterprises with at least \$1MM and above in net income and those that gross in excess of \$50MM. Active client base also includes companies that do in excess of \$5B in revenue.

This technology further enables brokers or individual HR team members within privately held or public companies to perform comprehensive independent evaluations and complex benefit plan implementations. The technology stack is primarily geared to be in collaboration with consultants and professional financial advisors. Often referred to as a web-based corporate briefcase, the Company's products enable companies and individuals to maximize existing financial tools and develop strategies that align them with best practices commonly used by industry leaders & Fortune 1000 companies. Such complex plans and the intricacies of the solutions offered are typically too sophisticated for smaller lower middle market and Main St. Businesses and the benefit consultants that usually service that piece of the market.

The Company's technology is designed to pinpoint optimal plan design results, and then shops the entire financial products marketplace to over 250 individual carriers within applicable use case illustrations} in order to insure optimal plan funding performance at both the time of plan inception and into the foreseeable future at each subsequent anniversary of the plan's implementation date.

Their impressive results have led to the Company's recognition by leaders in the artificial intelligence industry as it applies to the financial services risk and wealth management arena.

Ideal Transaction: Current owner is open to a potential partial sale to a strategic buyer or partner.

This information is secured from sources BUSINESS BUYER DIRECTORY, LLC, "BBD", believes to be reliable and accurate. BBD makes no representations or warranties whatsoever as to the accuracy of any of this information. Interested parties of the above noted company must verify the accuracy of this information and conduct their own due diligence and bear all risk for any information inaccuracies. BBD: does NOT represent this company or its agents, is not a business broker; are not FINRA/ NASD registered, provides only seller contact information, no advisory inputs. This is not an offer to sell, or a solicitation to sell securities. Information is void where prohibited.