

NORTHERN CALIFORNIA

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**BUSINESS BROKERAGE, INC.****SOUTHERN CALIFORNIA**

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SMALL PRACTICE SPECIALIST: Brandon Ribolin 800-274-4272 FAX: 949-715-2024 brandon@go2bbi.com**Linda Long, Sales Administrator/ Client Support: 800-274-4272, Fax: 949-715-2024 bbiemail@go2bbi.com****February 1, 2024 NORTHERN CALIFORNIA
CALL LEE RIBOLIN 800-727-4272****CPA PRACTICE #115013 LOS BANOS**

\$1,500,000 GROSS. Tax 63% (\$1,368 Avg. fee); Write-up/Bookkpg. 21% (\$9,720/Yr Avg.); Comps/Rev, Consulting 16%. Outstanding staff. Office building available to lease or buy. No in-person appts. for 75-80% of tax clients. Terms, Excellent Guarantee, Transition Support.

CPA PRACTICE #112113 FRESNO

\$1,200,000 GROSS. (2023 Est.). Tax 39% (\$876 Avg. fee); Write-up/Acctg. for Bus. Clients' tax prep. 43% (\$10,193/Yr. Avg. fee); Other 18% (Consulting, Fiduciary, Qtrly. Reports, Comps/Rev, misc.). Net 47%. Lease available or relocatable. No in-person appts. for 50-60% of tax clients. Excellent staff. Terms, Guarantee, Transition Assistance.

CPA PRACTICE #110023 SF BAY AREA/ SF PENINSULA

\$1,000,000 GROSS. Tax 92% (\$3,944 Avg.); Write-up 9% (\$12,143/Yr Avg.). Net 67%. No in person appts. for 95% of clients. Terms, Guarantee, Transition Assistance. **SOLD**

CPA #178023 SAN MATEO COUNTY

\$800,000 GROSS. Tax 83% (\$716 Avg.); Write-up 12% (\$7,004/Yr. Avg.); Other 5%. High Net: 82%. Indiv. /1040 clients' Avg. Income: \$277K. No in-person appts. for 50% of clients. Sellers available to work for new owner and offer Terms, Guarantee, Transition Support.

CPA PRACTICE #163222 SAN JOSE

\$750,000 GROSS. Tax 82% (\$534 Avg.); Bkkgp. 11% (\$5,018/Yr. Avg.); Other 7%. 61% Net. (2023: 8.6% Higher Gross, 9% Higher Net). No in person appts. for 70% of clients. Lease space in Seller-owned bldg.) or relocatable. Terms, Guarantee, Transition Assistance.

CPA #173022 PLEASANT HILL/ WALNUT CREEK

\$730,000 GROSS. Tax 68% (\$1,120 Avg. fee); Write-up/Bkkgp 13% (\$3,431 Yr/ Avg. fee); Consulting/Misc, P/R 19%. Net 57% (higher for buyer with an existing practice). No appts. for 90% of clients. Retain Seller's office or relocatable. Terms, Guarantee, Transitional Assistance.

E.A. PRACTICE #156322 SANTA CRUZ COUNTY

\$660,834 GROSS. Tax 58% (\$906 Avg.); Bkkgp, P/R. 18% (\$1,813/Yr. Avg.); Bus. Svcs/Tax & Estate Planning/Fin. Planning 24%. Good Net 61%. Revenue growth 6-8%/Yr. (25+% Gross Increase 2022). No appts. for 75% of tax clients. Great staff. Terms, Guarantee, Transition.

CPA TAX #158824 REDWOOD CITY/ MENLO PARK AREA

\$619,000 GROSS. 100% Tax (\$1,436 Avg. fee). Sale is for about 79% of \$780K Total Gross. No in-person meetings for 80% of clients. Clients' AGI: \$458K. Majority partner/ owner works 3 days/week. Staff will be leaving/ retiring, but 2 partners are available the 1st year. Terms, Guarantee, Transitional Assistance.

CPA & CTEC PRACTICE #155622 OAKLAND

\$557,000 GROSS. Tax 94% (\$795 Avg.); Write-up/Acctg. 6% (\$3,239/Yr. Avg.). High Net 70%. Ofc. in upper-income area. Lease negotiable or relocatable. No appts. for 90% of tax clients. AGI: \$204K. 2 partners available to work part-time. Terms, Guarantee, Transition Assistance.

CPA PRACTICE #150023 STOCKTON

\$500,000 GROSS. Tax 54% (\$452 Avg.); Acctg/Bkkgp. 36% (\$5,042/Yr Avg.); Misc. 10%. 60% Net, very few in person appts & relocatable. Seller available to work P-T. Terms, Guarantee, Transitional Assistance.

CPA PRACTICE #132522 MERCED

\$336,826 GROSS. Tax 76% (\$936 Avg.); Write-up/Bkkgp/Payroll 23% (\$3,858/Yr. Avg.); Other 1.8%. Seller to retain approx. \$48K for Trust/Estate clients. Buyer preferred who will retain Seller's ofc. at least 1st year. High growth oppty. Terms, Guarantee, Transition Assistance.

CPA #135123 EL DORADO CNTY: CAMERON PARK AREA

\$320,000 GROSS. Tax 74% (\$1,040 Avg. fee); Write-up (Assoc. w/ Tax Prep) 7% (\$9,499/Yr. Avg.); P/R 7% (6 clients, \$4,054/Yr Avg). May be relocated to Buyer's office. Est. Net 70%+. No in-person appts. for 45% of tax clients. Terms, Guarantee, Transition alAssistance.

CPA PRACTICE #128523 SAN FRANCISCO BAY AREA

\$285,000 GROSS. Tax 69% (\$969 Avg.); Bookkpg/Payroll 31% (\$3,626/Yr. Avg). High Net 90%. No in person appts. for 95% of tax clients. Seller works from home, so need to relocate to buyer's office. Uses Lacerte & QB. Terms, Guarantee, Transitional Assistance.

CPA #126023 LOS GATOS/CAMPBELL/ SAN JOSE AREA

\$260,300 GROSS. 100% Tax (\$1,085 Avg. fee). High Net 86%. Seller works from home office, so practice to be relocated to Buyer's ofc. No in-person appts. for 50% of clients. Terms, Guarantee, Transition.

E.A. TAX PRACTICE #120322 CAMPBELL/W. SAN JOSE

\$201,675 GROSS. 100% Tax (\$568 Avg. fee). 67% Net. Easy add to grow your practice. Great location (close to 880 & 280). Lease expires 10/31/24; possibly early termination. Terms, Guarantee, Transition.

CPA PRACTICE #119023 LOS BANOS

\$190,000 GROSS. Tax 70% (\$290 Avg.); Acctg/Bkkgp. 30% (\$2,389/Yr. Avg). Lease ofc. from Seller or relocatable. Seller & employee available to work for new owner, as needed. Terms, Guarantee, Transition.

CPA PRACTICE #116422 SAN RAMON

\$175,000 GROSS. Tax 100% (\$1,962 Avg. fee). Spin-off of 15% of practice. Net 93%. Great oppty. to grow your practice. Clients send tax info. electronically. No appts. for 97% of clients. Relocatable. Terms, Guarantee, Transitional Assistance.

CPA #1160233 PLACER COUNTY-AUBURN AREA

\$160,000 GROSS. Spin-off/sale of a book of tax clients, 50% of practice. Tax 100% (\$909 Avg. fee). Relocatable, so nearly a 99% Net. Spouse not ready to retire for a few years. Option for buyer to lease space, if interested. Terms, Guarantee, Transitional Assistance.

CPA PRACTICE #115023 CENTRAL TUOLUMNE COUNTY

\$150,312 GROSS. 100% Tax (\$524 Avg). High Net 63%. Great oppty. (as Seller did 30+ years ago) to live & work in area with a slower pace, a great area to raise a family & many outdoor activities. No in-person appts. for 50% of clients. Terms, Guarantee, Transitional Assistance.

CPA PRACTICE #112123 SAN RAMON-TRI VALLEY AREA

\$133,709 GROSS. (Available to buyer). Tax 68% (\$1,382 Avg. fee). Consulting, Foreign, Non-Resident, Expat, Misc. 32% (\$2,092 Avg. fee). Adjusted Net: 85%. Relocatable to Buyer's office. No in-person appts. for 80% of tax clients. Terms, Guarantee, Transition Assistance.

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CPA TAX #112724 SANTA ROSA/SONOMA COUNTY
\$127,929 GROSS. 100% Tax (\$1,242 Avg. Fee). Great opportunity to add to your practice. 85% Net and no in-person meetings for 70% of clients. Seller works from home, so needs to be relocated. Terms, Guarantee, Transitional Assistance.

E.A. TAX PRACTICE #107923 WALNUT CREEK
\$79,000 GROSS. Tax 95% (\$789 Avg. fee); Consulting 5%. 94% Net. No in-person appts. for 90% of clients. Seller works from home; practice to be relocated to buyer's office. Terms, Guarantee, Transition.

CPA TAX PRACTICE #106623 WALNUT CREEK
\$66,000 GROSS. 100% Tax (\$1,478 Avg. fee). Spin-off of a book of tax clients (15% of practice). ~100% Net. Need to relocate to Buyer's ofc. No appts. for 90% of clients. Terms, Guarantee, Transition.

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CPA PRACTICE #238023 SHERMAN OAKS
\$3,867,266 GROSS. Tax 60% (\$2,379 Avg.); Write-up 17% (\$11,173/Yr. Avg.); Other 23% (Consulting, Bus. Mgmt., Misc). Premier practice established in 1960. No in-person appts. for 90% of tax clients. Tax clients Avg. Income/Yr. \$609K+. Terms, Guarantee, Transition.

CPA PRACTICE #210422 THOUSAND OAKS
\$1,145,000 GROSS. Tax 50% (\$3,470 Avg); Compliance Audits 25%; Other Audits 25% (\$22,077 Avg). Net 68%. No in-person appt. for 100% of tax clients (meets with 15 Intl. clients). Tax clients Avg. AGI: \$600K. Terms, Guarantee, Transitional Assistance.

CPA PRACTICE #211023 NEWPORT BEACH
\$1,045,000 GROSS. Tax 100% (\$1,917 Avg. Fee). Net 49%. Mo-Mo. rent/ relocatable. Staff CPA's work remote. No appts for 80%+ of clients. Terms, Guarantee, Transition. **SOLD**

CPA PRACTICE #298124 TUSTIN
\$981,676 GROSS. 100% Tax/Business Services/Consulting (combined). \$1,273 Avg. fee. Net 97%. Practice to be relocated to Buyer's office. No meetings for 99% of clients. Seller available first tax season, as needed. Terms, Guarantee, Transitional Assistance.

CPA PRACTICE #295023 ENCINO
\$963,000 GROSS. Tax 72% (\$4,714 Avg. fee); Write-up 6% (\$8,510/Yr. Avg.); Bus. Mgmt, Pension Acctg, P/R Prep. 21%. 90% of clients have no appt. Terms, Guarantee, Transition. **UNDER CONTRACT**

CPA TAX #272022 SAN DIEGO-MISSION VALLEY
\$784,311 GROSS. Tax 100% (\$1,303 Avg. fee). 100% of tax clients have no in person meeting. Net 55%. 7%+ projected growth in 2023. Relocatable when lease expires 6/30/25. 15% of clients have foreign assets. Terms, Guarantee, Transition. **SOLD**

CPA PRACTICE #256023 TORRANCE
\$560,000 GROSS. Tax 40% (\$366 Avg); Write-up/Bookkpg. 60% (\$2,671/Yr Avg). Net 47%. If practice is relocated, Net will be much higher. No appts for 60% of tax clients. Terms, Guarantee, Transition.

CPA PRACTICE #245523 SAN DIEGO - MISSION VALLEY
\$455,180 GROSS. Tax 62% (\$1,152 Avg); Bkkpg 20% (\$1,293/Yr Avg.); Misc 18%. No meetings for 95% of tax clients. Seller in ofc only on Mon. Terms, Guarantee, Transition Assistance. **SOLD**

CPA PRACTICE #226023 SAN DIEGO - LA MESA AREA
\$260,000 GROSS. Tax 71% (\$549 Avg. fee); Write-up/Bkkpg. 29% (10 clients, \$7,600/Yr. Avg). No meetings for 98% of clients. Retain Seller's ofc. or relocate w/prior notice. Terms, Guarantee, Transition.

CPA TAX PRACTICE #222423 SAN DIEGO - EL CAJON AREA
\$228,497 GROSS. 100% TAX (\$914 Avg. fee). Net 58%. Seller-owned office condo available to lease or buyer may relocate. Net will be higher for buyer with an existing practice & office. No meetings for 80% of clients. Very low A/R plus Terms, Guarantee, Transitional Assistance.

CPA PRACTICE #220013 CALABASAS/SFV/L.A.
\$200,000 GROSS. Tax 62% (\$1,313 Avg. fee); Write-up/Bkkpg. 26% (13 clients, \$4,038/Yr. Avg.); Misc. 12%. Net 67%. Seller's clients located in Calabasas, San Fernando Valley, Greater L.A. No in-person appts. for 90% of tax clients. P-T Bkkpr. to remain & Seller available 1st tax season. Terms, Guarantee, Transitional Assistance.

CPA PRACTICE #218823 TUSTIN/SANTA ANA AREA
\$177,100 GROSS. (Seller to retain about 20%, not reflected in listing). Tax 88% (\$1,186 Avg. fee); Write-up 9% (\$5,567/Yr. Avg.); Compt. 3%. Net 81% Need to relocate to Buyer's office. No in-person appts. for 80-85% of clients. Terms, Guarantee, Transitional Assistance.

CPA PRACTICE #208823 SAN DIEGO- KEARNY MESA
\$88,000 GROSS. Tax 98% (\$677 Avg. fee); Consulting 2%. Quick sale needed due to health issues. Net 98%. Seller works from Executive Suite ofc (available or buyer may relocate). No appts. for 50% of clients. Terms, Guarantee, Transition Assistance. **SOLD**

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