



## For Sale

Location: **Melbourne**  
Asking: **Expressions of Interest**  
Type: **Finance**

### Under Management. Strong Recurring Revenue & Scalable

A rare opportunity to acquire a highly profitable, established mortgage management and financial coaching business with a robust recurring revenue model, long-term client retention, and a proven track record of success.

#### Key Highlights:

Strong Recurring Revenue Over \$2.7M in recurring trail revenue in FY24.

Proven Growth Revenue consistently increasing year-on-year.

Loyal Client Base Significantly higher retention rates than industry norms.

Remote Operations & Scalable Model Fully remote workforce means this business is not geographically tied to any location.

Unique Competitive Edge The business operates a model that provides multiple revenue streams.

Proprietary Systems & Branding Established frameworks and systems ensure this business is ready for significant growth

#### Financial Snapshot

Total Revenue: \$4.84M

Recurring Revenue: \$2.71M

Loan Book: \$744M

This business is prime acquisition opportunity for an existing and sizable mortgage brokerage, financial services group or private equity firm looking for a scalable business that is operated under management with potential to grow rapidly.

Confidential Sale: Details available upon signing a confidentiality agreement.

For a full Information Memorandum, copy and paste the below link to complete the confidentiality agreement - <https://form-morgan-business.web.app/form/1K21WlbAR2K3kmO5K1Kw>

Dru

### Contact:

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