



For Sale

Location: **Melbourne**
Asking: **\$2,400,000**
Type: **Finance / Services-Professional**

Boutique Accounting & Financial Planning Practice Rare Integrated Opportunity for Sale

This long-established, highly regarded practice delivers a true one-stop solution for accounting, taxation, and holistic financial advice. Proudly independent and self-licensed, the firm has built an exceptionally loyal client base through decades of personal service, technical excellence in SMSF and retirement planning, and genuine care for every client's financial journey. Operating from a charming, professionally fitted-out premises that is instantly recognisable in its community, this is a turnkey business ready for seamless transition.

Key highlights:

- * Generating over \$1 million in revenue in the current calendar year with strong profitability.
- * Over 900 active clients, including 800+ tax/accounting clients and 110 ongoing financial planning relationships.
- * Fully integrated service model (accounting, tax, SMSF, retirement planning, wealth protection and insurance) under one trusted brand.
- * Self-licensed AFSL providing complete independence and best-interest advice.
- * Experienced, stable team in place, including a qualified financial planning/accounting manager, a junior accountant and client service support.
- * Prime professional premises in a high-growth area with excellent visibility and client parking available for continuation of lease or potential purchase.

A genuine retirement sale offering immediate cash flow, recurring revenue streams, and significant growth potential in Melbourne's booming outer-east and Yarra Valley corridor. Ideal for an existing practice seeking scale, a senior adviser looking to step into ownership, or a larger group wanting a profitable bolt-on.

For a detailed prospectus and more information on this not-to-be-missed opportunity, please contact Paul Smith from Yield Business Brokers.

Qualified buyers are invited to register interest in the detailed information memorandum. Details about the business for sale are confidential and will only be disclosed after a Confidentiality Agreement is signed, at the broker's discretion.

Stock photos might be utilised to represent the business without revealing its identity.

Contact:

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Business Brokers Network
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Broker Ref: 25102



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Keywords: Accounting, Accountant, Financial Planning, Mortgage Broker, Mortgage Brokerage, Finance, Lending, Online.