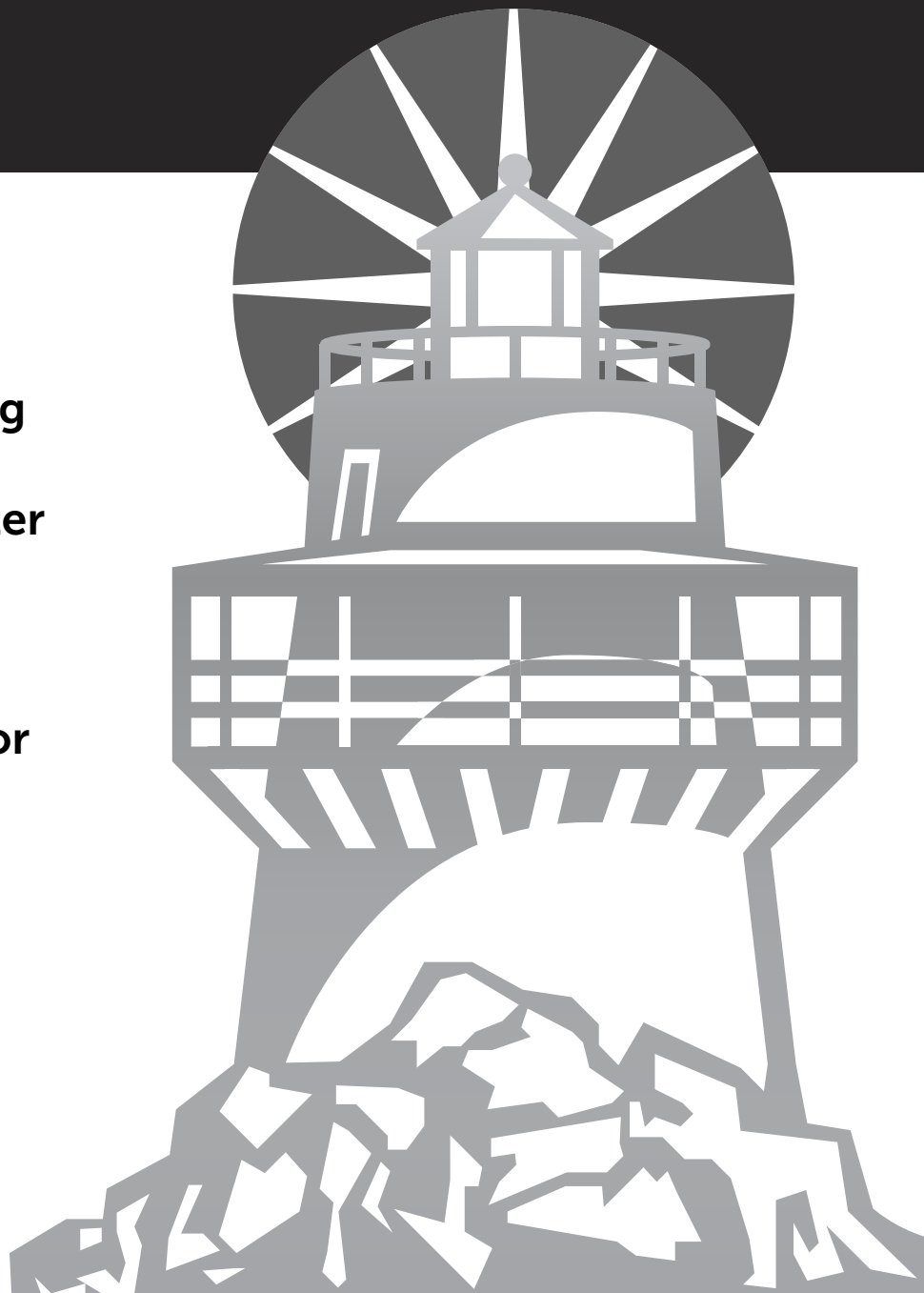


# BENCHMARK BY BEACON STRATEGIES

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A platform for institutional wealth management firms which collects and displays business data and comparison marketplace metrics in an anonymized manner.

- ✓ **Comprehensive and anonymous data for analysis and reporting**
- ✓ **Intelligence that better equips executives/leaders**
- ✓ **Factual foundation for more confident business decisions**





# BENCHMARK

Provide wealth management firms with a trusted source of comparison data that is standardized, anonymized, relevant, and meaningful.



## ARE YOU CURIOUS ABOUT HOW YOU COMPARE TO OTHER FIRMS IN THE INDUSTRY?

You need more than rhetoric information about how your firm compares to its peers. Benchmark illustrates your firm's rankings, laying the groundwork for more fact-based business planning and resource planning allocation.

-  Identify critical trends and business changes
-  Evaluate the impact of business decisions and investments
-  Measure against a base of relevant and filterable subscribers
-  Turn your data into insights and actions

Enter Survey Data | Resume Paused Survey

2022 Section 1 of 14

\* Total Firm Revenues (000's)

\* Total Revenues Commission Based Accounts (000's)

\* Total Revenues Fee Based Accounts (000's)

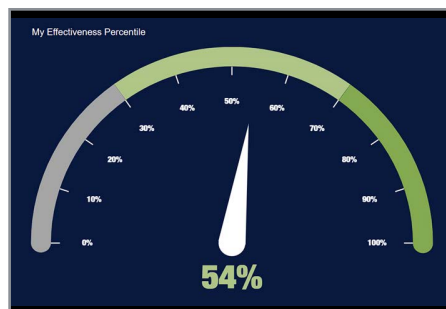
\* Total Other Revenues (000's)

\* Other Revenues Interest Income (000's)

Previous | Next

### ENTER YOUR DATA

Twice a year add your firm's data. In July for a progress report, and in January for a full year. Over 130 data points translates into over 300 benchmarks.



### A VISUAL EXPERIENCE

Compare your firm to peer competitors graphically on various data points and categories.



### SIX DIMENSIONS TO COMPARE

- Revenue Efficiency
- Expense Efficiency
- Advisor Efficiency
- Operating Efficiency
- Firm Growth
- Operations and Service Levels

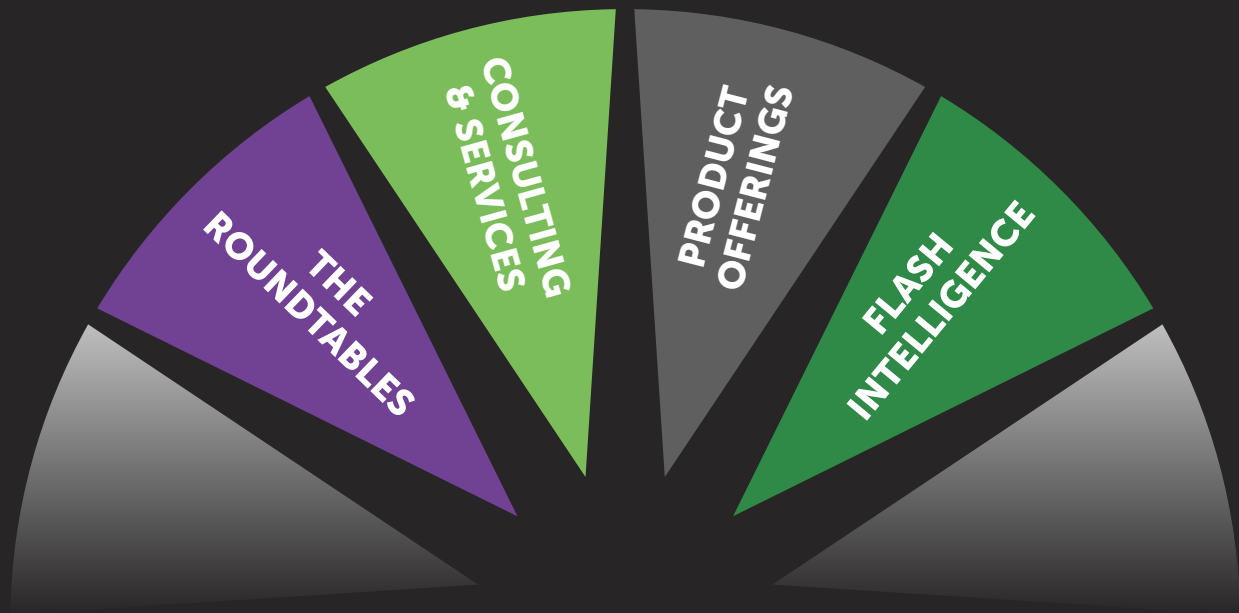


**BEACON STRATEGIES, LLC**

CONSULTING | ROUNDTABLES | PRODUCTS & SERVICES

## AS THE INDUSTRY CONTINUES TO EVOLVE, FIRMS ARE FACING INCREASING HEADWINDS

Chip Kispert founded Beacon Strategies, LLC in 2006 to help wealth management firms and solution providers meet these challenges with thought provoking roundtables, experienced consulting services, and next generation products and services. Since opening the Beacon doors, Chip and the Beacon team have become the central repository and bridge to the ever-evolving network of products and services available to wealth firms.



We're excited to share with you our suite of operational, educational, consulting and practice management product offerings designed to support your firm's growth goals and employee development.

To learn more about Benchmark  
and Beacon Strategies:

[Schedule a meeting with Chip](#)

