Attracting and retaining skilled, motivated people are essential to your firm’s success. Compensation plays a critical role in that. The Compensation Benchmarking Tool allows you to evaluate how your approach to employee compensation compares with that of your peers. Containing data from Schwab’s annual RIA Benchmarking Study—the leading study of compensation data in the RIA industry—the tool provides advisors with industry-specific compensation data unlike anything else available today.

Gain insight into market-specific benchmarks

Use the Compensation Details to view detailed compensation data for 24 employee roles typically found at RIA firms.

Compensation data can be seen for national, tier, and regional market benchmarks, when available. National benchmarks represent all firm responses for a particular role.

Tier benchmarks represent a compilation of counties across the country as defined by the cost of labor. Regional market benchmarks are composed of counties belonging to the same tier within a specific regional geographic area.

View compensation data by:
- Role
- Years of experience
- Location

View details on:
- Job responsibilities
- Pay
- Certifications
- Ownership

“Our firm has participated in the Benchmarking Study for many years. We appreciate the expanded focus on compensation data, as we actively use that information when making compensation decisions. It’s a very meaningful tool.”

—Julie Goodrum, Director of Operations, Wagner Wealth Management
Employee benefits
Access information beyond compensation, including:
- Medical and dental insurance
- Disability coverage
- Life insurance
- Defined contribution plans
View benefit data by firm type or firm size.

Firm ownership
See how a firm’s equity is shared among staff.
View ownership distribution among working, nonworking, and outside owners.
View data by firm size.

Get started
Participate in the 2016 RIA Benchmarking Study from Charles Schwab between January 26 and March 21, 2016, and receive a 150+ page, customized compensation report for your firm, as well as access to the online tool. You can review the questions at advisor-services.schwab.com/benchmarking-education. All study submissions must be completed online during the eight-week open period.

More human capital resources from Schwab
Whether you need guidance on hiring and compensation or tools to help you groom the next generation of leaders, we’re here to help. Schwab Business Consulting Services provides a full suite of resources and support to help you build on your strengths and seize new opportunities. Talk to your relationship manager or visit schwabadvisorcenter.com/humancapital to learn more.