

# Assets Under Management (AUM) per Registered Financial Representative

*Benchmarks, Definition & Measurement Details*

**SAMPLE  
CONTENT & DATA**



# AUM per Registered Financial Representative

Definition & Measurement Details



## What is Assets Under Management (AUM) per Registered Financial Representative?

The total dollar amount of assets managed (AUM) by the firm divided by the total number of registered financial representatives working for the firm at the same point in time.

### Why should this KPI be measured?

Assets Under Management (AUM) per Registered Financial Representative measures the average dollar amount of client asset's managed per registered financial representative. A relatively low value

### How is this KPI calculated?

Two values are used to calculate this KPI: (1) the total dollar amount of assets under management by the firm and (2) the total number of registered financial representatives working for the firm at the time

**ABRIDGED CONTENT**  
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# AUM per Registered Financial Representative

Benchmarks & Characteristics of High Performers



## Assets Under Management (AUM) per Registered Financial Representative

Total AUM / Number of Registered Financial Representatives



### Characteristics of High Performers

- KPIs are well-defined, tracked and tied to performance reviews
- Robust self-service options for customer

Sample Size: XX

KPI Type: XX

Unit: XX

Is High or Low Best?: XX

**How to read this chart:** This chart summarizes the performance gaps between high (Top 5%), mid (Median) and low (Bottom 5%) performers for this Key Performance Indicator (KPI). For example, the column labeled "Top 5%" represents a company that outperformed 95% of the peer group observed for this metric.

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