

Assets Under Management (AUM) per Wealth management Branch

Benchmarks, Definition & Measurement Details

**SAMPLE
CONTENT & DATA**



Assets Under Management per Wealth Management Branch

Definition & Measurement Details



What is Assets Under Management (AUM) per Wealth management Branch?

The total dollar amount of assets under management (AUM) divided by the total number of wealth management branches/offices managed by the company at the same point in time.

Why should this KPI be measured?

AUM per Wealth Management Branch measures the average dollar amount of client assets managed per wealth management branch or office. A relatively low value for this KPI may suggest that the company

How is this KPI calculated?

Two values are used to calculate this KPI: (1) the total dollar amount of AUM of the company, and (2) the number of wealth management offices or branches. The calculation includes typical

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Assets Under Management per Wealth Management Branch

Benchmarks & Characteristics of High Performers



Assets Under Management (AUM) per Wealth management Branch

Total Assets Under Management / Number of Wealth Management Offices



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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