

# 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 initial

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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

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**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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