# Clients per Advisor

Benchmarks, Definition & Measurement Details





# **Clients per Advisor**

Definition & Measurement Details



### What is Clients per Advisor?

The total number of wealth management clients managed by the company divided by the number of financial advisors working for the company at the same point in time.



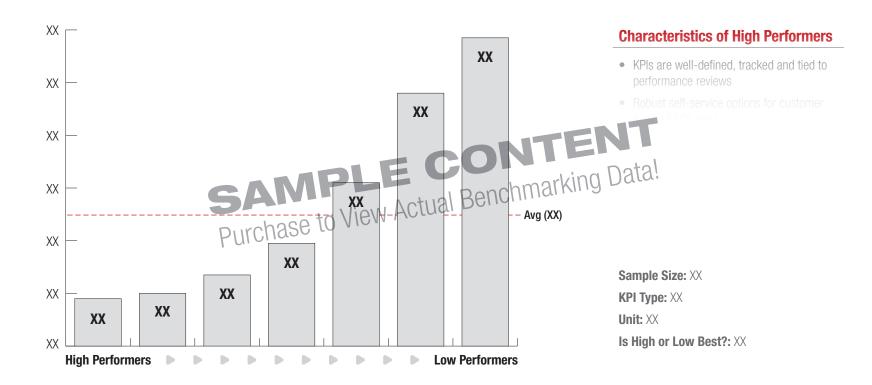
## **Clients per Advisor**

Benchmarks & Characteristics of High Performers



### **Clients per Advisor**

Total of Number of Wealth Management Clients / Number of Advisors



**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.

# **Benchmarking Report Terms & Conditions**

OpsDog KPI Reports



© 2017 OpsDog, Inc.

The OpsDog KPI Reports and their contents are protected by copyright laws, contain the trademark OpsDog, Inc., and are OpsDog's proprietary information. No part of this book shall be reproduced, stored in a retrieval system, or transmitted by any means, electronic, mechanical, photocopying, recording or otherwise, without written permission from OpsDog, Inc.

OpsDog, Inc. assumes no liability with respect to the use of the information contained herein which is provided "as is" and there are no warranties of any kind provided by OpsDog with respect to this report. OpsDog assumes no responsibility for errors or omissions and will not be liable for any damages resulting from the use of the information contained herein.

### OpsDog, Inc.

1502 Augusta Dr., Suite 200 Houston, TX 77057

Tel: 844-650-2888