

**2018 REPORT CARD ON BANKS**  
**The average advisor**

	OVERALL		TOP 20%		REMAINING 80%	
	2018	2017	2018	2017	2018	2017
<b>Average</b>						
Age	42.0	41.8	46.2	44.9	41.9	41.7
Years with firm	12.5	11.7	19.0	16.6	12.0	10.8
Years in industry	16.6	16.7	21.3	20.2	16.6	16.6
Value of book (\$mil.)	90.6	85.2	179.6	164.7	70.4	65.9
No. of client households	296.0	325.5	264.0	235.8	274.9	298.7
AUM/client household (\$)	366,070	341,474	712,931	735,793	278,423	243,395
<b>% of average book in client accounts of:</b>						
Less than \$100,000	11.5	17.0	4.0	8.0	11.3	15.8
\$100,000 to \$250,000	28.6	30.0	17.8	20.8	30.7	31.6
\$250,000 to \$500,000	32.3	29.6	31.9	29.8	33.7	31.2
\$500,000 to \$1 million	19.8	16.1	29.9	22.8	18.0	15.8
\$1 million to \$2 million	6.0	5.3	11.6	11.5	5.1	4.5
More than \$2 million	1.8	2.0	4.8	7.1	1.2	1.0
<b>Average % of gross revenue derived from:</b>						
Mutual funds	45.0	48.5	43.1	50.8	47.8	47.8
Proprietary managed	23.0	16.4	26.0	22.1	21.8	18.5
Third-party managed	2.9	2.1	7.2	5.7	1.8	1.6
PPNs	1.2	1.2	2.0	2.9	1.2	1.0
GICs	21.0	20.8	16.8	13.1	20.4	21.4
Term deposits	2.7	3.7	1.8	2.9	3.1	3.8
High-interest savings	3.7	4.2	2.7	2.3	3.4	3.0
Insurance	0.5	3.1	0.0	0.0	0.0	0.0

SOURCE: INVESTMENT EXECUTIVE RESEARCH

INVESTMENT EXECUTIVE CHART