

Best pay for the \$2M adviser at wirehouse and regional BDs

For an advisor generating \$2 million in production, which firm pays the most? It's a question *On Wall Street* aims to help advisors answer through our annual analysis of compensation plans. Our analysis lists the starting points for payouts across the employee advisory channel.

Note: Our analysis represents starting points for payouts. A number of special policies are not included here since they do not affect 100% of the population evenly and therefore are more haphazard to compare. Individual results can vary dramatically, based on the mix of business and policies at each firm. For example, pay can rise from special bonuses and fall from penalties such as discount sharing, small client limits, and ticket charges.

EDWARD JONES

- **CASH GRID: \$787,500**
- **AVG. OFFICE PROFIT: \$394,400**
- **TOTAL: \$1,181,900**

RAYMOND JAMES & ASSOCIATES

- **CASH GRID: \$920,000**
- **+ DEFERRED: \$185,000**
- **TOTAL: \$1,105,000**

RBC WEALTH MANAGEMENT

- **CASH GRID: \$960,000**
- **+ DEFERRED: \$110,000**
- **TOTAL: \$1,070,000**

STIFEL

- **CASH GRID: \$964,000**
- **+ DEFERRED: \$100,000**
- **TOTAL: \$1,064,000**

HILLIARD LYONS

- **CASH GRID: \$964,000**
- **+ DEFERRED: \$100,000**
- **TOTAL: \$1,064,000**

JANNEY MONTGOMERY SCOTT

- **CASH GRID: \$920,000**
- **+ DEFERRED: \$140,000**
- **TOTAL: \$1,060,000**

UBS

- **CASH GRID: \$920,000**
- **+ DEFERRED: \$90,000**
- **TOTAL: \$1,010,000**

MERRILL LYNCH

- **CASH GRID: \$875,000**
- **+ DEFERRED: \$131,250**
- **TOTAL: \$1,006,250**

WUNDERLICH

- **CASH GRID: \$1,000,000**
- **+ DEFERRED: \$0**
- **TOTAL: \$1,000,000**

MORGAN STANLEY

- **CASH GRID: \$867,300**
- **+ DEFERRED: \$112,700**
- **TOTAL: \$980,000**

Best pay for the \$1M adviser at wirehouse and regional BDs

For a million-dollar producer, where is the best pay today? *On Wall Street's* annual analysis of compensation plans at the wirehouse and regional broker-dealers helps advisers answer that question.

Advisors — whether a \$1 million producer or on the path to be one — will find within this analysis the starting points for payouts at the leading firms.

EDWARD JONES

- **CASH GRID: \$393,750**
- **AVG. OFFICE PROFIT: \$154,400**
- **TOTAL: \$548,150**

STIFEL

- **CASH GRID: \$464,000**
- **+ DEFERRED: \$50,000**
- **TOTAL: \$514,000**

RAYMOND JAMES & ASSOCIATES

- **CASH GRID: \$455,000**
- **+ DEFERRED: \$56,000**
- **TOTAL: \$511,000**

HILLIARD JONES

- **CASH GRID: \$464,000**
- **+ DEFERRED: \$40,000**
- **TOTAL: \$504,000**

RBC WEALTH MANAGEMENT

- **CASH GRID: \$460,000**
- **+ DEFERRED: \$41,800**
- **TOTAL: \$501,800**

WUNDERLICH

- **CASH GRID: \$500,000**
- **+ DEFERRED: \$0**
- **TOTAL: \$500,000**

JANNEY MONTGOMERY SCOTT

- **CASH GRID: \$450,000**
- **+ DEFERRED: \$50,000**
- **TOTAL: \$500,000**

WELLS FARGO

- **CASH GRID: \$455,480**
- **+ DEFERRED: \$27,500**
- **TOTAL: \$482,980**

MERRILL LYNCH

- **CASH GRID: \$420,000**
- **+ DEFERRED: \$60,000**
- **TOTAL: \$480,000**

UBS

- **CASH GRID: \$440,000**
- **+ DEFERRED: \$35,000**
- **TOTAL: \$475,000**

Source: Company data compiled by SourceMedia; analysis by Tasnady & Associates

Best pay for the \$600K adviser at wirehouse and regional BDs

On Wall Street continues its annual analysis of compensation plans, looking at the starting points for payouts at the leading wealth management firms. The report below focuses on the \$600,000 producer category.

EDWARD JONES

- CASH GRID: \$236,250
- AVG. OFFICE PROFIT: \$61,620
- TOTAL: \$297,870

STIFEL

- CASH GRID: \$264,000
- + DEFERRED: \$30,000
- TOTAL: \$294,000

RBC WEALTH MANAGEMENT

- CASH GRID: \$264,000
- + DEFERRED: \$17,820
- TOTAL: \$281,820

HILLIARD LYONS

- CASH GRID: \$264,000
- + DEFERRED: \$12,000
- TOTAL: \$276,000

RAYMOND JAMES & ASSOCIATES

- CASH GRID: \$267,000
- + DEFERRED: \$0
- TOTAL: \$267,000

JANNEY MONTGOMERY SCOTT

- CASH GRID: \$267,000
- + DEFERRED: \$0
- TOTAL: \$267,000

WELLS FARGO

- CASH GRID: \$255,480
- + DEFERRED: \$5,000
- TOTAL: \$260,480

MERRILL LYNCH

- CASH GRID: \$240,000
- + DEFERRED: \$18,000
- TOTAL: \$258,000

MORGAN STANLEY

- CASH GRID: \$243,810
- + DEFERRED: \$14,190
- TOTAL: \$258,000

UBS

- CASH GRID: \$234,000
- + DEFERRED: \$0
- TOTAL: \$234,000

Source: Company data compiled by SourceMedia; analysis by Tasnady & Associates

Best pay for the \$400K adviser at wirehouse and regional BDs

On Wall Street continues its annual analysis of compensation plans, looking at the starting points for payouts at the leading wealth management firms. The report below focuses on the \$400,000 producer category.

STIFEL

- **CASH GRID: \$164,000**
- **+ DEFERRED: \$20,000**
- **TOTAL: \$184,000**

EDWARD JONES

- **CASH GRID: \$157,500**
- **AVG. OFFICE PROFIT: \$15,200**
- **TOTAL: \$172,700**

RBC WEALTH MANAGEMENT

- **CASH GRID: \$168,000**
- **+ DEFERRED: \$4,400**
- **TOTAL: \$172,400**

RAYMOND JAMES & ASSOCIATES

- **CASH GRID: \$170,000**
- **+ DEFERRED: \$0**
- **TOTAL: \$170,000**

HILLIARD LYONS

- **CASH GRID: \$164,000**
- **+ DEFERRED: \$4,000**
- **TOTAL: \$168,000**

MERRILL LYNCH

- **CASH GRID: \$152,000**
- **+ DEFERRED: \$10,000**
- **TOTAL: \$162,000**

JANEY MONTGOMERY SCOTT

- **CASH GRID: \$160,000**
- **+ DEFERRED: \$0**
- **TOTAL: \$160,000**

WELLS FARGO

- **CASH GRID: \$155,480**
- **+ DEFERRED: \$1,000**
- **TOTAL: \$156,480**

MORGAN STANLEY

- **CASH GRID: \$138,960**
- **+ DEFERRED: \$5,040**
- **TOTAL: \$144,000**

UBS

- **CASH GRID: \$140,000**
- **+ DEFERRED: \$0**
- **TOTAL: \$140,000**

The four lists originate from an article published by Andrew Welsh on April 19th, 2017: "Which firms top the rankings?" Please visit www.onwallstreet.com for details.

Source: Company data compiled by SourceMedia; analysis by Tasnady & Associates

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