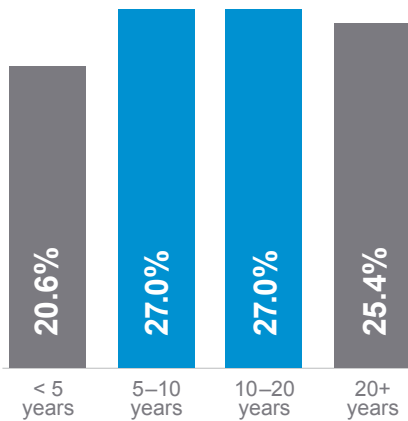


2018 FINANCIAL COMPENSATION REPORT

Findings and Results

DEMOGRAPHICS

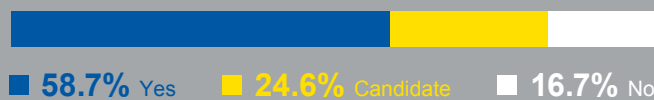
Years of experience



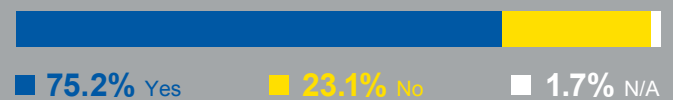
Popular job titles

Portfolio manager (equities)	10.3%
Manager of managers/director of investments	7.1%
Bank/trust/private client portfolio manager	6.3%
Financial analyst (corporate)	6.3%
Other	6.3%
Portfolio manager (fixed income)	6.3%
Chief investment officer	4.8%
Consultant	4.8%
Financial advisor/broker	4.8%
Buy-side research analyst (equity)	4.0%
Private client professional (other)	4.0%
Sell-side research analyst (equity)	4.0%

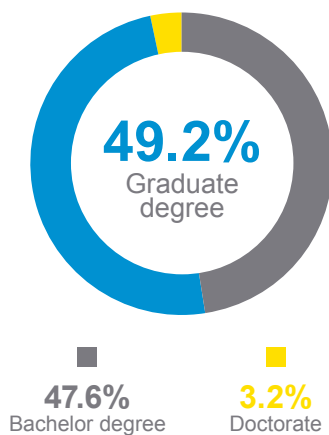
CFA charterholder status



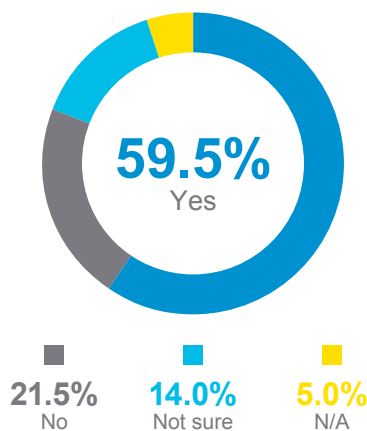
Do you feel valued by your company



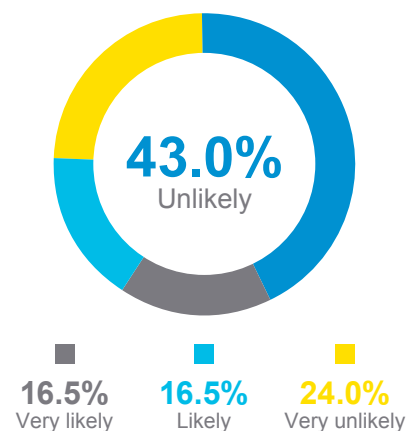
Level of education



Opportunity for advancement within company

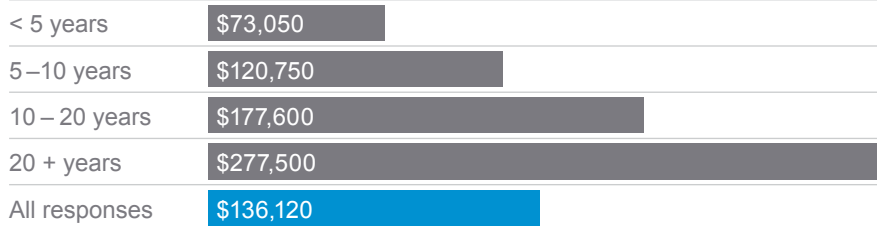


Likelihood of looking for a new role in 2018

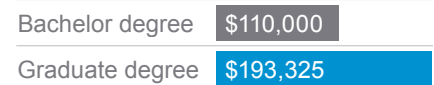


COMPENSATION

Median total compensation by years of experience



Median total compensation by education



Fairly compensated

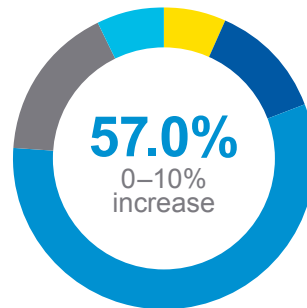


59.7%
Yes



40.3%
No

Expected total compensation change in 2018 compared to 2017



- 6.6%** Decline
- 12.4%** Stay the same
- 16.5%** 10–20% increase
- 7.4%** >20% increase

Median total compensation by CFA charterholder status

\$195,200
CFA charterholder

\$91,775
Non-CFA charterholder

95.9%

of those surveyed report that
CFA® Charter designation
has helped their career

CFA Charterholder comparison does not control for other variable such as years of education, experience or job title.