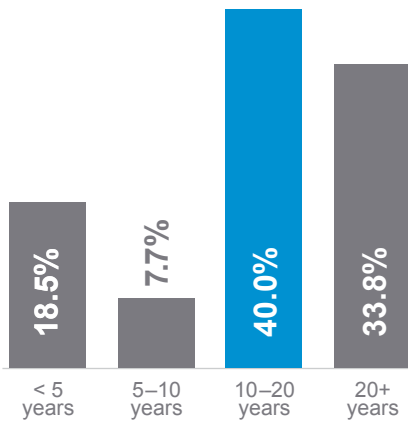


2018 FINANCIAL COMPENSATION REPORT

Findings and Results

DEMOGRAPHICS

Years of experience



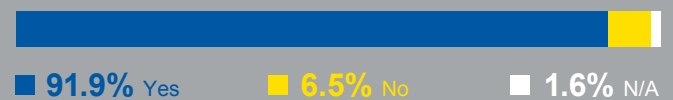
Popular job titles

Portfolio manager (equities)	10.8%
Bank/trust/private client portfolio manager	9.2%
Buy-side research analyst (equity)	7.7%

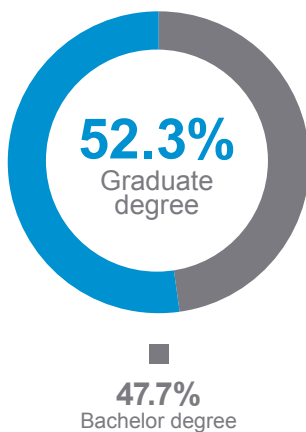
CFA charterholder status



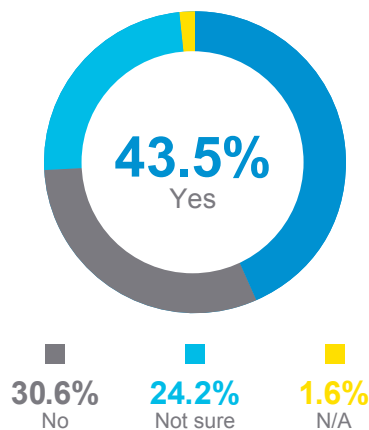
Do you feel valued by your company



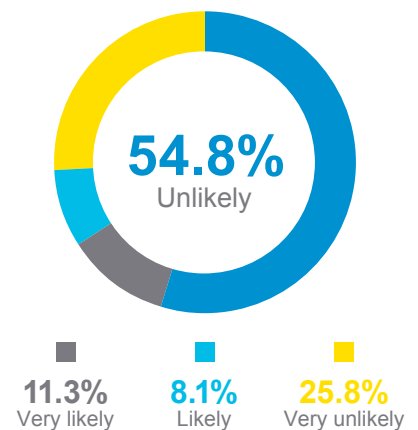
Level of education



Opportunity for advancement within company



Likelihood of looking for a new role in 2018



COMPENSATION

Median total compensation by years of experience

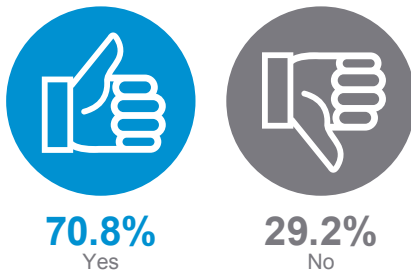
< 5 years	\$72,900
5–10 years	\$88,500
10–20 years*	\$215,000
20+ years	\$200,800
All responses	\$175,000

Median total compensation by education

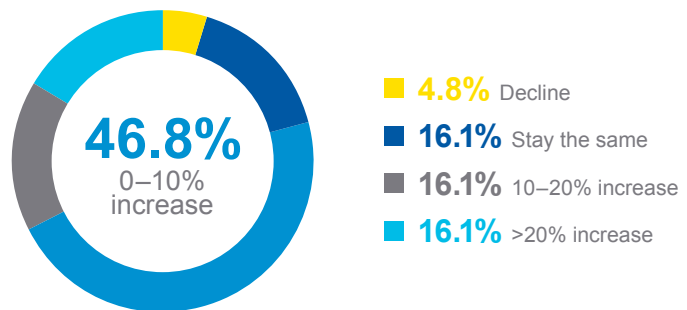
Bachelor degree	\$122,000
Graduate degree	\$215,000

*Differences in compensation structure – specifically, bonuses – may explain the similarity in total compensation among respondents with 10-20 vs. 20+ years' experience.

Fairly compensated



Expected total compensation change in 2018 compared to 2017



Median total compensation by CFA charterholder status

\$201,600
CFA charterholder

\$85,250
Non-CFA charterholder

100%

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.