

# MEMBERSHIP SERVICES GUIDE

2016–2017

# We help you understand, communicate about, and improve your firm's performance.

## TOGETHER WE CAN ANSWER THESE 6 CRITICAL QUESTIONS:

How can you get greater operating leverage?

What investments will help grow your business?

How effective are you at turning assets into revenues?

How can you grow faster?

Are clients voting for your business?

How do you get the best out of your people?

## MEMBERSHIP AT WISE GATEWAY GIVES YOU

### PERFORMANCE DASHBOARDS



#### Understand

your performance by leveraging the gold standard in wealth management benchmarks.

Our performance reports provide comprehensive detail about the metrics that matter most to your business, from margins to growth and sales to productivity. Our data spans organizations of all sizes in nearly every state in the country.

### CONSULTATIVE REVIEWS



#### Improve

your performance by identifying strengths and opportunities in your firm's performance data.

In dialogue with you and your team, we will review your firm's performance and share our perspectives. These reviews provide you with a dispassionate, expert perspective on your firm's performance: a second set of eyes to help you identify strengths, opportunities, and risks.

### AN ADVOCATE



#### Communicate

more effectively with your stakeholders and set appropriate expectations.

We support your key communications at every level of your organization, from the board to the management team to sales and service personnel. We can help arm you with the insight and information you need to deliver effective presentations or present directly to your key constituents.

# ADDITIONAL MEMBER BENEFITS



## RESEARCH: INSIGHT ABOUT YOUR INDUSTRY

Applying creative quantitative analysis to the industry's most intractable sales, pricing, and productivity challenges.

Spanning a dizzying array of products and complex service processes, the business of wealth management deserves a new, rigorous approach to understanding its performance. Our goal is to provide you with empirically-derived insight and research— about growth and profitability, first and foremost—that will help you better understand the business you manage.

## MEMBER MEETINGS: ENHANCE YOUR NETWORK

Executives from across the industry meet to discuss critical industry trends.

Our member community represents the best of wealth management, from small organizations to large, and from trust companies to private banks. We proudly work with scores of our industry's best and brightest, and endeavor to provide opportunities for you to network and have substantive discussions of shared issues.



## CUSTOM DATA ANALYSIS: EXTEND YOUR TEAM

Our staff helps you with data analysis for your project work and presentations.

Do you need to know the return on assets for companies with your firm's identical business mix? How many employees you are likely to need to support two times your current assets? What is the impact of trust outsourcing on staff productivity? We provide custom analysis to support your key initiatives and help you make better decisions.



NEW IN 2017

## FEE REALIZATION AND PRICING

# Are you getting paid full value for the services you provide?

### THE GOOD

The benefits of improving revenue realization from existing relationships are unequivocal, and improving pricing strategies is a realistic goal for many. Leveraging our extensive network of wealth managers, we plan to do for pricing and fee realization what we've done for evaluating your business performance. In 2017, we will launch a comprehensive, quantitative, and customized study of pricing practices.

### THE BAD

Due to demographics, shifting asset allocations, regulatory changes, unbundling, and a host of other factors, many firms are concerned about fee compression. Competitive pressures are also forcing firms to discount significantly to compete for new business. The result? Revenue realization rates have been stagnant for the last three years. Now is the time to assess your firm's pricing strategies and identify opportunities for improvement.

## OUR PROPOSAL

Our 2017 pricing research will help you evaluate your effectiveness at realizing revenue from existing relationships, identify pricing weaknesses, and offer specific strategies and case studies to help guide improvements.

### KEY AREAS OF INQUIRY

How do your firm's fees compare with those of others? What percentage of stated fees are other firms realizing?

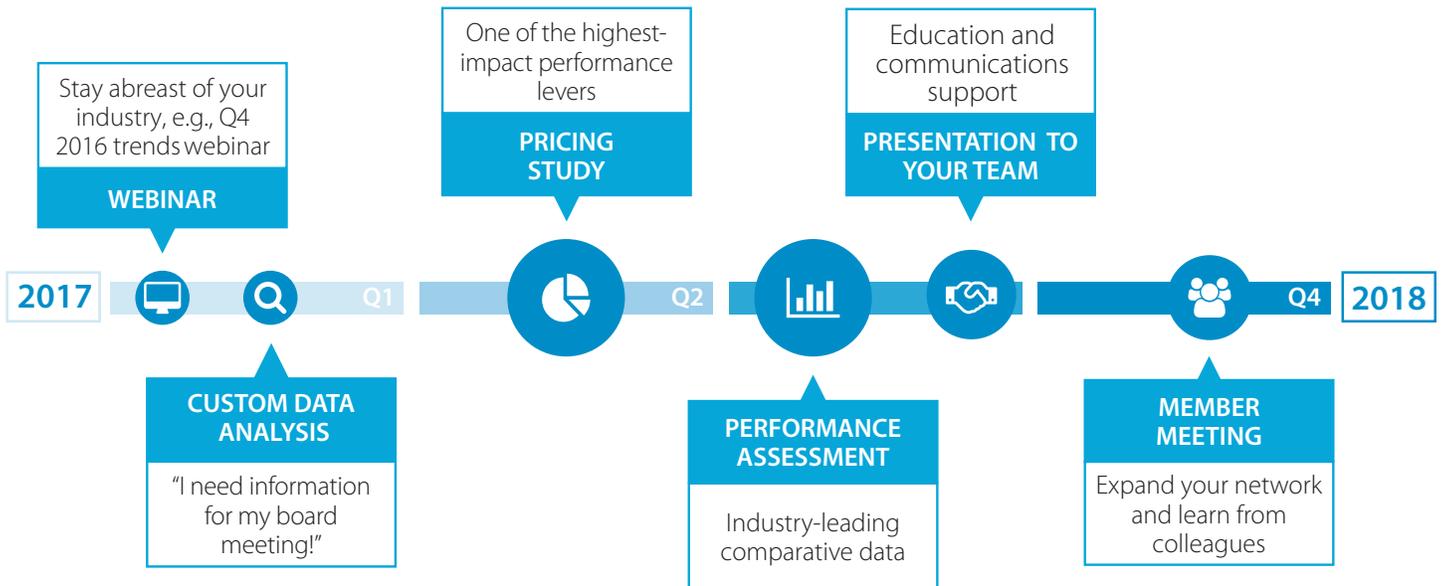
What business practices and characteristics are most predictive of positive fee outcomes (e.g., geography, asset mix, centralized pricing discretion)?

What are controllable levers for improving pricing and revenue realization? What is typical of high performers?



# CALENDAR OF EVENTS

*How we work with others; how we can support you.*



Helping you make **WISE** decisions

[WWW.WISEGATEWAY.COM](http://WWW.WISEGATEWAY.COM)

## FOR MORE INFORMATION

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