

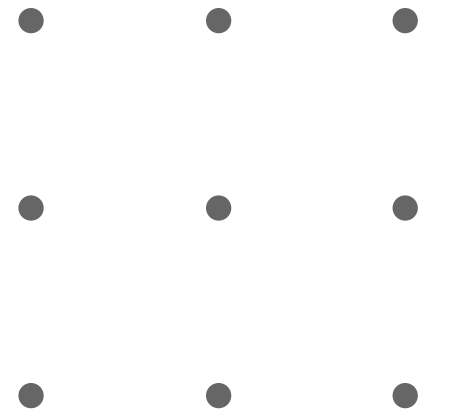


ALEX. BROWN

# Alex Brown

## Advisor Sentiment Survey





# First things first

As we converse daily with dozens of Alex Brown advisors, we noticed a recurring subject around **uncertainty** which would lead to the following question: *“What are you seeing other FA’s like me do?”*

In this survey we set out to answer that question. **The Gershman Group conducted an independent survey**, anonymous compiling conversations over the past several weeks.



# The Who

If you're curious to find out which advisors we spoke with, we have the answer to that as well. The average age of the Advisors we spoke with are 37-54 years old, with an average book of almost \$500M in AUM. Their length of service was 14 to 19 years and produced anywhere from \$2.2M to \$6.4M in revenue as a single producer, not accounting for additional revenues from other team members.



**Age: 37-54**



**AUM: \$496M - \$1B**

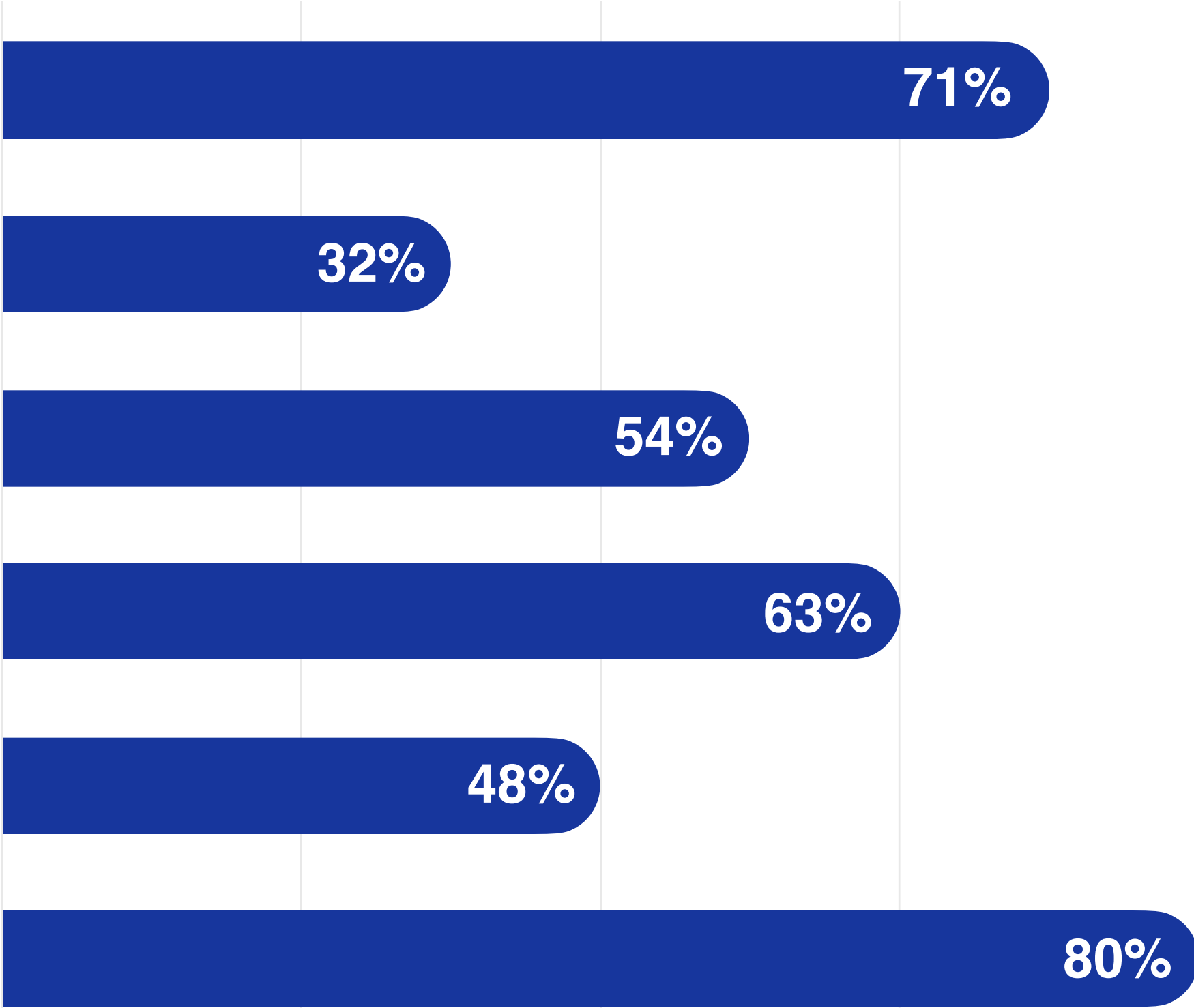


**Revenue: \$2.2M - \$6.4M**



**LOS: 14-19**

# The Results



How happy are you with the culture at RJ/AB?

Do you think AB division will be around in 10yrs?

Do you have an interest in Independence?

Is the platform satisfactory to the industry avg?

Would you consider shopping around?

How disappointed are you with Haig's exit?





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