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Family Office Exchange Launches 2014 Wealth Advisor Benchmarking Study

Study to Provide Insight on Top Industry Trends and Competitive Advantages

Chicago, September 30, 2014—Family Office Exchange (FOX), a global membership organization of private family enterprises, their family offices, and key advisors, announced that it has launched its 2014 FOX Wealth Advisor Benchmarking Study. Once complete, the study – the longest-running in the industry – will provide an in-depth examination of the wealth advisor business model and allow participants to gauge their performance versus the industry.

“Throughout our history, FOX has helped wealth advisors develop their service offerings and business models by providing the latest insight on product model and service delivery,” said Amy Hart Clyne, executive director of the FOX Knowledge Center. “This year, 2014 FOX Wealth Advisor Benchmarking Study will go well beyond the standard measures of asset size, revenues, expenses and pricing structure to address the top trends and competitive advantages that are top-of-mind among today’s wealth advisors.”

Among other topics, the 2014 FOX Wealth Advisor Benchmarking Study provides a unique focus into the following select areas:

- **Regulatory compliance** – *How are firms staying ahead of the curve in an increased regulatory climate?*
- **Technology** – *In what operational areas are the benefits of technology being leveraged the most?*
- **Data security** – *What are firms doing to combat increasingly sophisticated cyber criminals?*
- **Client satisfaction and experience** – *What tools are firms utilizing to stay on top of their client experience?*

“The wealth advisory business operates in a constantly evolving, highly competitive environment,” said Hart Clyne. “The findings from the 2014 FOX Wealth Advisor Benchmarking Study will provide community members with key insight on how they stack up against other firms, which they can then use to optimize their firms for greater success.”

Participation is open to any firm that provides a combination of planning and investment advisory services to ultra-wealth firms, including registered investment firms, private banks with an ultra-high net-worth platform, trust companies and other financial services firms. There is no cost to participate in the study, and participants will receive the study results by early 2015.

Participants must complete the full survey by October 24, 2014. For registration information, visit www.familyoffice.com/wealth-advisor-benchmarking.

About Family Office Exchange

For background information: <https://www.familyoffice.com/media-kit>.