



**A companion service to TRUSTCOMPARE®  
A Pohl Consulting and Training, Inc. Company**

**For more information contact:**

**Loyd Pohl, CEO  
Pohl Consulting and Training, Inc  
[elpohl@pohlconsulting.com](mailto:elpohl@pohlconsulting.com)**

**COMPCOMPARE™**

A Companion Service to TRUSTCOMPARE®

A service of Robert H. Franke & Associates, A Pohl Consulting and Training, Inc. Company

We keep hearing about the need for **compensation** comparison data on **Trust and Wealth Management** positions. There are many reasons for this need including the need to **retain** quality people and that many of the other sources of compensation data are woefully lacking in Trust industry comparisons. As answer to the above questions and as solution to your need, we offer you “COMPCOMPARE™”.

For each position, you will receive average and median salary, salary ranges, bonus and incentive data and correlation analysis where appropriate. **The report will also present demographically adjusted salary data that you can adjust to your own market using a cost of living adjustment factor.**

*Are my people appropriately paid?*

*How should I price a new position or a new incumbent to a position?*

*How does my salary fit the market place?*

For each position (listed on the next page), you will receive average and median salary, salary ranges, bonus and incentive data and correlation analysis where appropriate.

The price is \$695 for the Small Department (Basic) Report which will encompass seven typical positions in a smaller Trust Department and \$1195 for the Large Department (Comprehensive) Report which will encompass nineteen positions found in a larger Trust Department.

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## **SMALL DEPARTMENT/COMPANY REPORT POSITIONS**

1. TRUST DEPARTMENT MANAGER
2. PERSONAL TRUST OFFICER
3. ADMINISTRATIVE ASSISTANT
4. EMPLOYEE BENEFITS ADMINISTRATOR(TO– SVP)
5. TRUST PORTFOLIO MANAGER (TO – SVP)
6. TRUST OPERATIONS SUPERVISOR
7. TRUST OPERATIONS SPECIALIST

## **LARGE DEPARTMENT/COMPANY REPORT POSITIONS**

1. TRUST DEPARTMENT MANAGER
2. CHIEF FIDUCIARY OFFICER
3. TRUST BUSINESS DEVELOPMENT OFFICER
4. PERSONAL TRUST DEPARTMENT MANAGER  
(VP – SVP)
5. PERSONAL TRUST OFFICER (Two Exp. Levels)
6. TRUST ADMINISTRATOR
7. ADMINISTRATIVE ASSISTANT
8. TRUST DEPARTMENT EMPLOYEE BENEFITS  
MANAGER
9. EMPLOYEE BENEFITS ADMINISTRATOR  
RELATIONSHIP MANAGER (TO– SVP)
10. RETIREMENT PLAN SERVICES ADMINISTRATOR
11. EMPLOYEE BENEFIT RECORDKEEPING  
SPECIALIST
12. EMPLOYEE BENEFIT EDUCATION  
SPECIALIST
13. TRUST INVESTMENT DEPARTMENT  
MANAGER
14. TRUST PORTFOLIO MANAGER (TO – SVP)
15. INVESTMENT ASSISTANT
16. TRUST OPERATIONS MANAGER
17. TRUST OPERATIONS SUPERVISOR
18. MUTUAL FUND PROCESSING SPECIALIST
19. REMITTANCE SPECIALIST
20. TRUST OPERATIONS PROJECT SPECIALIST
21. EQUITY TRADING SPECIALIST

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## COMPCOMPARE REPORT DATA TEMPLATE

RESPONSE PROFILE	COMPCOMPARE DATA	YOUR DATA
# Data points for this position		
Average Market Size (Population)		
Average Organization Size (based on Revenue)		
Average Years Experience		
Average Years with the organization		
Average Years in this position		

### SALARY AND TOTAL COMPENSATION STATISTICS

Average Salary		
Median Salary		
Salary Range		
Average Total Compensation		
Median Total Compensation		
Salary as % of Total Compensation (Average)		
Average Salary Equalized to Naperville, IL		
Median Salary Equalized to Naperville, IL		

### NON-SALARY COMPENSATION PERCENTAGE FOR EACH POSITION

Average % of Salary paid in Bonuses (including zero bonus payouts)		
Average % of Salary paid in Incentives (including zero bonus payouts)		

### CORRELATION ANALYSIS FOR EACH POSITION

Correlation of Salary to Market Size	
Correlation to Organization Size	
Correlation to Years Experience	
Correlation to Years with the organization	
Correlation to Years in Position	

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## **COMPCOMPARE™ SUBSCRIPTION FORM**

I would like to purchase the COMPCOMPARE report.

Small Department (Basic at \$695)

Large Department (Comprehensive at \$1195)

Contact Name:	
Organization:	
Street Address:	
City, State, Zip:	
Phone # :	
Fax # :	
Email Address:	

**FAX TO: 815-561-3573**

An invoice will be sent for the subscription fee upon receipt of this form. The report will be mailed upon receipt of payment.

*Pohl Consulting and Training, Inc. also operates under the Robert H. Franke & Associates and TRUSTCOMPARE business name providing organizational development support to financial institutions nationwide. We are an industry leader in providing sales, service and sales management training, executive search and management consulting services.*

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