



## **2022 Financial Advisor Payout Grid:**

### **\$0 - \$220,000 revenue credits**

Effective payout:

Personal 48% Shared 24% PWA Referred 40% BPB Referred 20%

### **\$220,001-\$330,000 revenue credits**

Effective payout:

Personal 53% Shared 26% PWA Referred 44% BPB Referred 22%

### **\$330,001-\$440,000 revenue credits**

Effective payout:

Personal 58% Shared 29% PWA Referred 48% BPB Referred 24%

### **\$440,001- \$550,000 revenue credits**

Effective payout:

Personal 62% Shared 31% PWA Referred 52% BPB Referred 26%

### **\$550,001-\$660,000 revenue credits**

Effective payout:

Personal 67% Shared 34% PWA Referred 56% BPB Referred 28%

### **\$660,001+ revenue credits**

Effective payout:

Personal 72% Shared 36% PWA Referred 60% BPB Referred 30%

Revenue credits are defined as:

- 100% of net (through RJFS grid) revenue generated from personal cases.
- 100% of net revenue generated from joint BPB cases (rep is allocated BPB portion).
- 50% of revenue from cases with PWA Advisor (Ex. Advisor and Producer would be allocated 50% each from revenue on a life insurance case from one of Advisor's clients.)
- 50% of revenue from cases with PWA/BPB cases. (Ex. Advisor and Producer would be allocated 50% of revenue towards grid on a

life insurance case from a BPB client.)

