



2022 Financial Advisor Payout Grid:

\$0 - \$242,000 revenue credits

Effective payout:

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

\$242,001-\$363,000 revenue credits

Effective payout:

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

\$363,001-\$484,000 revenue credits

Effective payout:

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

\$484,001- \$605,000 revenue credits

Effective payout:

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

\$605,001-\$726,000 revenue credits

Effective payout:

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

\$726,001+ 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.)

