

# BEST PLACES TO WORK FOR FINANCIAL ADVISERS

REGISTRATION DEADLINE:

October 1, 2021

## What is the Best Places to Work for Financial Advisers program?

This program is a survey competition to determine which participants are the best employers. The process is managed by Best Companies Group (BCG) and winners are published in an issue of Investment News.

## What is Best Companies Group (BCG)?

Best Companies Group is an independent research firm specializing in identifying and recognizing great places to work. BCG manages programs worldwide, including the US, Canada, and the UK.

## Why Participate?

By participating, you can find out if you are one of the industry's best employers! It can also result in significant organizational benefits for entrants:

- **Heightened Company Pride:** If your company appears on the list, it could improve employee morale and retention.
- **Public Relations and Marketing Advantage:** Organizations can use the distinction to enhance recruiting efforts, increase the value of general marketing and improve reputations.
- **The BCG Insights Report Package:** While participation is FREE, participants can pay as little as \$705 to receive their Insights Report Package detailing the company's employee responses. Also included are employee and employer benchmarks.

## Who Can Participate?

To be eligible for consideration, organizations must:

- Must be in business a minimum of one year
- Have a minimum of 15 US employees (All employees in your company should be included not just your financial advising department)
- Be a registered investment adviser (RIA), affiliated with (but not an employee of) an independent broker dealer (IBD), or a hybrid/dually-registered firm affiliated with an IBD and doing business through an RIA
- Have a minimum of 15 US employees

## Assessment Description

The process includes two surveys to gather detailed data about each participating company.

BCG conducts the surveys, analyzes the data and determines the winners and rankings.

- **Part I – Employer Questionnaire (EQ):** The employer (main company contact) will complete this survey, detailing company policies, practices, benefits and demographics. The employer will be asked to complete the EQ online.
- **Part II – Employee Engagement & Satisfaction Survey (EES):** The employee survey is an in-depth set of statements (77) that employees will be asked to respond to on a 1-5 Likert scale of "Strongly Disagree" to "Strongly Agree". This section of the survey will also include two (2) open-ended questions, and seven (7) demographic questions. If e-mail and internet technology is not available for use by company employees, BCG also has paper surveys available.

## Announcing & Recognizing the Winners!

The contact at each company is notified of their status prior to the release of the winner rankings in February 2022.

Non-winning organizations are not publicly revealed.

For more information or to register, please visit

[www.inBestPlacestoWork.com](http://www.inBestPlacestoWork.com)

or contact the program coordinator, Madelyne Barroso at  
717-323-5272 or at [MBarroso@BestCompaniesGroup.com](mailto:MBarroso@BestCompaniesGroup.com)

InvestmentNews

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2022

## What Does It Cost?

# of Employees	# of Employees Surveyed	Online Fee
15-24	All	FREE
25-99	All	FREE
100-199	All	FREE
200-499	Up to 250*	FREE
500-2499	350*	FREE
2500+	400*	FREE