

## Major RIA Industry Benchmarking Studies

<b>Study</b>	<b>Participant Window</b>	<b>Eligible Participants</b>
<b>InvestmentNews Pricing &amp; Profitability Study</b>	March - April 2022	All RIAs, broker-dealers, and hybrid firms. Participating firms receive a free copy of the study.
<b>Schwab RIA Benchmarking Study</b>	January 26 - March 16, 2022	RIAs on the Schwab and TD Ameritrade custodial platforms
<b>Fidelity RIA Benchmarking Study</b>	April - May 2022	RIAs on the Fidelity custodial platform
<b>XYPN Benchmarking Survey</b>	April 2022	XY Planning Network member firms