



**Pearl Meyer**

# The Compensation Survey Provider for Banking Associations

Banking Association Partnership Overview



## Pearl Meyer's Banking Compensation Surveys

For more than 25 years, Pearl Meyer has been **the definitive** source of banking industry compensation data. Hundreds of institutions rely on us to guide their compensation strategy and decision making each year by working with our senior team of compensation consultants and survey experts.

Pearl Meyer publishes national surveys that provide the most advanced programming and algorithms to ensure confidentiality and accuracy. The banking survey suite includes the Banking Compensation Survey, the Banking Benefits and Human Resources Policies Survey, and the Banking Board of Directors' Survey.

Through our partnerships with banking associations throughout the U.S., we have more states in our portfolio for banking than any other survey provider. We currently work with 660+ banks and financial institutions in the U.S. and numerous banking associations.

## Running Your Association's Salary Survey

Whether you are designing a new salary survey or need help managing an existing one, Pearl Meyer has the knowledge, expertise, and experience to help you reach your objectives.

We recognize that a survey report is only one step towards the most important outcome – your complete satisfaction that your needs have been met and will continue to be met. Our approach is straight forward. We listen to you, collaboratively develop solutions based on your needs and ideas, and create and deliver timely, accurate, and cost-effective results.

### Benefits of Working with Pearl Meyer

- + Dedicated account managers
- + Generous fee sharing arrangements (your association will receive a percentage of every survey bought)
- + Survey experts available to present report findings at events or on webinars
- + Opportunity to connect with experienced compensation consultants
- + Custom reports upon request



## Our Banking Surveys:

Evaluate **300+** different job positions within an organization

Offer exclusive insight into peer policies and practices, including:

- + Short-and long-term incentive plan design
- + Starting hourly rates for branch positions
- + Bank & teller turnover rates
- + Salary structure and merit increase budgets

Are in compliance with legal guidelines, including Safe Harbor Guidelines

### Key Data Reported:

- + Base Salary
- + Short-Term Incentives
- + Long-Term Incentives
- + Total Cash/Target/Direct Compensation
- + Mortgage Originator Compensation
- + Commercial Loan Officer Compensation
- + Miscellaneous Human Resources Practices

## Policies and Practices

**13. In what month will your 2017 Common Date increase for Officers be effective?**  
Please select one ...

**14. For Non-Officers, are compensation increases provided on:**  
 Anniversary Date  
 Common Date

**15. In what month will your 2017 Common Date increase for Non-Officers be effective?**  
Please select one ...

	All	Asset 10-50M	Asset 50-100M	Asset 100-250M	Asset 250-500M	Asset 500-1B	Asset 1B+	FTS 100+	FTS 200+	FTS 750+
Base Salary	87%	87%	85%	77%	80%	80%	100%	82%	81%	84%
Short-Term Incentives	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Long-Term Incentives	5%	5%	6%	6%	6%	6%	10%	4%	3%	6%
Total Cash/Target/Direct Compensation	85%	84%	84%	80%	80%	80%	100%	80%	79%	82%
Mortgage Originator Compensation	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
Commercial Loan Officer Compensation	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
Miscellaneous HR Practices	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%

## Pearl Meyer's Banking Survey Suite Includes:

Using the most advanced programming and algorithms to ensure confidentiality and accuracy, the banking survey suite includes the Banking Compensation Survey, the Banking Benefits and Human Resources Policies Survey, and the Banking Board of Directors' Survey.

- + **Banking Compensation Survey** data can be obtained in the following ways to offer you the most relevant targeted and industry-wide data:
  - + **Single state reports** for Alabama, California, Connecticut, Florida, Georgia, Massachusetts, New York, Ohio, Texas and Virginia.
  - + **Regional reports** for the Northeast (that includes MA, RI, CT, ME, VT, NH and NY), a regional report for Northern New England (that includes NH, ME and VT), a regional report for the Banks of the Carolinas and a South Atlantic report (that includes AL, FL, GA, NC, SC and VA).
  - + **National banking report** that offers compensation information from banks throughout the country.
- + **Banking Board of Director Survey** provides the most relevant information available on board of directors' compensation and governance practices.
- + **Banking Benefits and Human Resources Policies Survey** is the definitive source for the most current information on benefits programs and human resources policies including PTO programs, health and dental insurance, flexible spending accounts, and short- and long-term disability plans.

## Streamlined, Secure Client Portal

The client portal provides a streamlined and secure environment for survey administration. It includes an introduction page with navigation tabs (Introduction, Data, Policies & Practices, Survey Positions & References, Help) and instructions for submitting data. A key feature is the 'Survey Positions' page, which provides a complete list of position descriptions by category. Below is a table of positions from the screenshot:

Category	Position	Position Name	Position Description
Executive Management	101	Chief Executive Officer	Institution's number one position. Overall responsibility for management direction and control of the institution. Oversees development of strategic plans, objectives and policies. May also be titled Chairman and/or President.
Executive Management	102	Chief Operating Officer	Responsible for all or most operations of the institution. Implements plans and policies and ensures achievement of goals. May also be titled President, Vice Chairman or Executive Vice President. Generally this is the top position. Most other officers report to this position.
Executive Management	278	Chief Credit Officer	Responsible for developing and implementing strategies, policies and procedures for all lending activities. Oversees and ensures overall quality of loan portfolio, approves large and complex loans and recovers assets. Performs direct supervisory duties of department staff, and coordinates staff for coverage in all related areas of the department. Assumes responsibility and is accountable for adherence to bank policies and procedures.
Executive Management	138	Chief Financial Officer	Responsible for the institution's financial plans and policies. Oversees the functions of accounting, budgeting, tax and treasury. May also be responsible for investment management, Accounting and financial management functions report directly or indirectly to this position. Reports to CEO.

## Customized

Our senior team of banking industry and survey experts is one phone call away to help you customize and analyze the data Pearl Meyer provides.



## Contact Us

For more information on participating in Pearl Meyer’s compensation survey, please contact the survey group at [survey@pearlmeyer.com](mailto:survey@pearlmeyer.com) or 508-460-9600.

To learn more about our banking compensation consulting services visit [www.pearlmeyer.com/banking](http://www.pearlmeyer.com/banking) or email [banking@pearlmeyer.com](mailto:banking@pearlmeyer.com).



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**Benji Sheiffer**  
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**Rhonda Snyder**  
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**Veronika Valcheva**  
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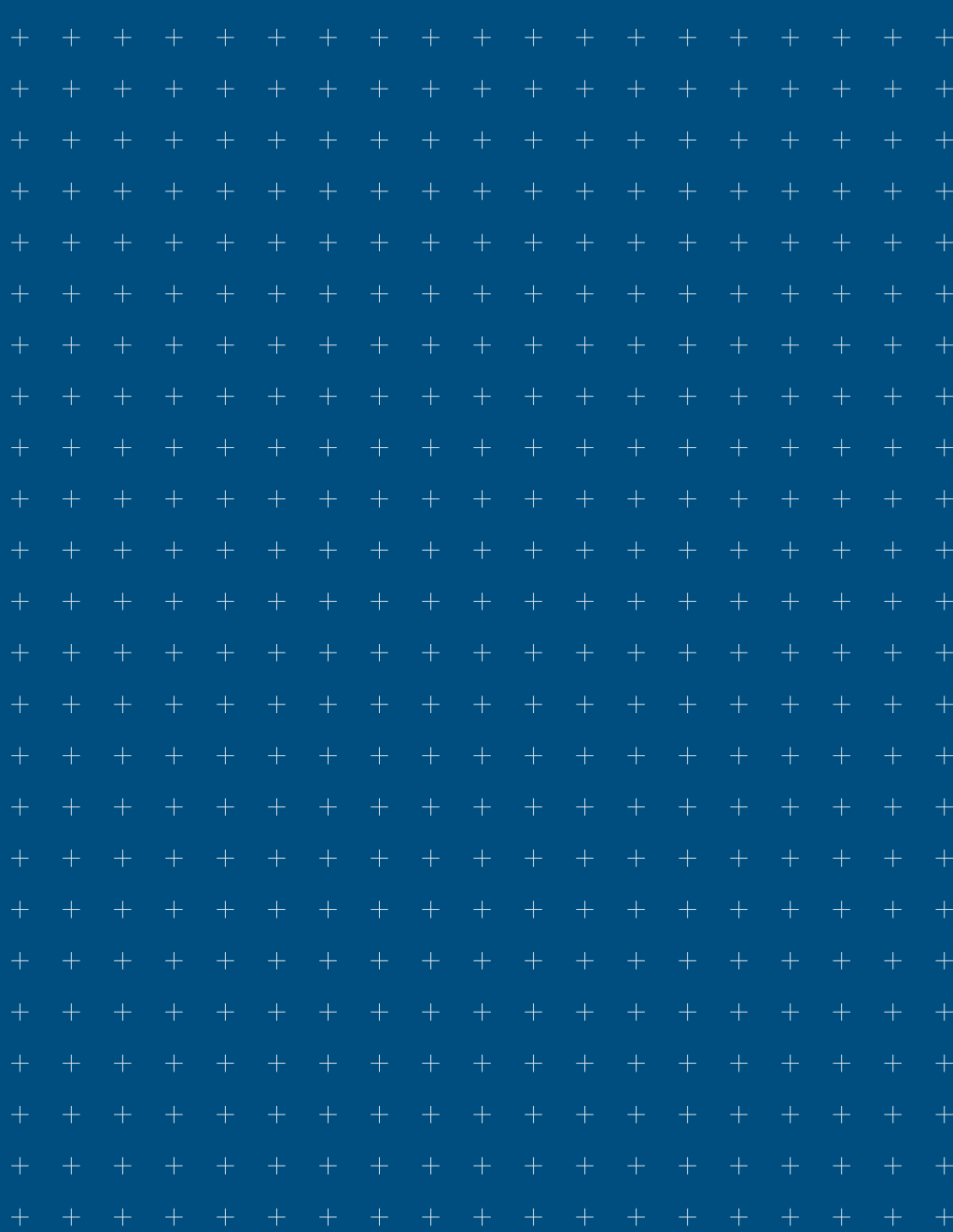
## About Pearl Meyer

Pearl Meyer is the leading advisor to boards and senior management helping organizations build, develop, and reward great leadership teams that drive long-term success. Our strategy-driven compensation and leadership consulting services act as powerful catalysts for value creation and competitive advantage by addressing the critical links between people and outcomes. Our clients stand at the forefront of their industries and range from emerging high-growth, not-for-profit, and private organizations to the Fortune 500.

[pearlmeyer.com/banking](http://pearlmeyer.com/banking) 

## About Pearl Meyer's Banking Compensation Consulting

Pearl Meyer is the leading advisor to Boards and senior management on the alignment of executive compensation with business and leadership strategy, making pay programs a powerful catalyst for value creation and competitive advantage. Through knowledgeable consultants focused exclusively on the financial sector, our Banking Industry Group has helped hundreds of financial institutions achieve their objectives.



For more information on Pearl Meyer,  
visit us at [www.pearlmeyer.com](http://www.pearlmeyer.com) or  
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