



ANAHEIM
2009

The Annual Conference of the Financial Planning Community

TRACK:	<i>SUPER SESSION</i>
SESSION: 979074	ADVISOR PERSPECTIVES -- BENCHMARKING STUDY INSIGHTS
	SUNDAY, OCTOBER 11, 2009
	2:00 PM - 3:00 PM
PRESENTER:	Mark Palmer, J.D.
	Charles Schwab
	101 Montgomery Street
	San Francisco, CA 94104

Mr. Palmer is a managing director of business consulting for Schwab Advisor Services. In addition to leading workshops and roundtables across the West, he spends his time working one-on-one with advisors, addressing the full array of business issues practices face. Mr. Palmer has over 15 years of experience in the financial services industry. Before joining Schwab, he ran Comerica Bank's Wealth and Institutional Management group in the Bay Area. Previously, he held a senior leadership role at Wells Fargo Private Client Services, heading strategy, marketing, training and financial planning. Early in his career, he was a financial advisor, advising on more than \$130 million in assets for high net worth clients. Mr. Palmer earned a bachelor's degree from Claremont McKenna College, and both a law degree and a master's degree in international finance and marketing from Georgetown University. He is a sailor, a pilot and an "optimistic golfer."

Advisor Perspectives

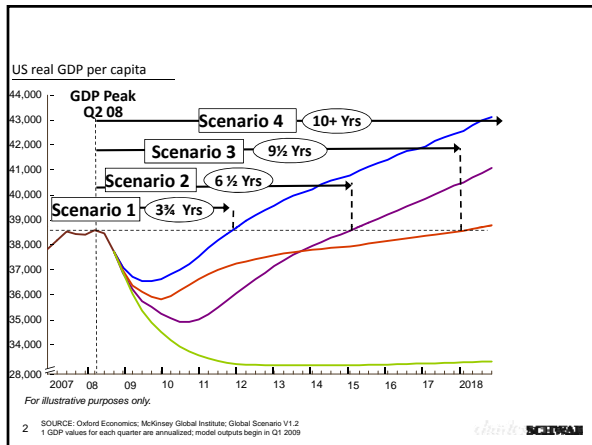
Benchmarking Study Insights

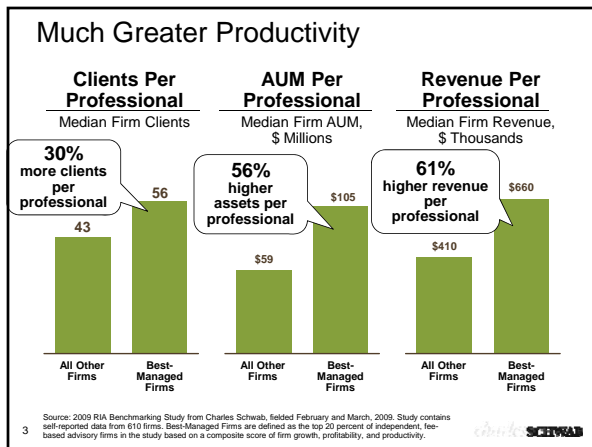
National FPA
 Anaheim, CA
 October 11, 2009

Mark Palmer
 Managing Director, Schwab Advisor Services

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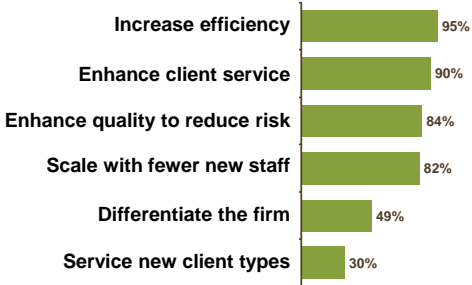






Motivation for Tech Purchases

Percent of Firms, \$25MM+ Firms



4 Source: 2009 RIA Benchmarking Study by Charles Schwab, fielded February and March, 2009. Study contains self-reported data from 610 firms.



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