

Registration Deadline:
June 12, 2026

BEST PLACES TO WORK IN MONEY MANAGEMENT

What is this?

The Best Places to Work in Money Management is a survey and awards program that honors employers in Money Management that are making their workplaces great. This is a project of Pensions & Investments in partnership with Workforce Research Group.

What's the process like?

A two-part survey is conducted to get a thorough assessment of each employer.

- Part 1 consists of an Employer Assessment where we capture details about policies and practices.
- Part 2 consists of the Employee Feedback Survey where we capture employees' opinions about their workplace experience.

Employee surveys can be conducted via online or paper survey methodologies.

Both the employer and employee data sets are combined to determine the best workplaces.

Who is eligible?

Organizations must meet the following criteria:

- Be publicly or privately held
- Be a for-profit or not-for-profit business or public agency
- Have at least 20 full- and/or part-time employees working in the United States.
- Have a facility in the United States
- Have been in business for at least one year, at the registration deadline
- Have at least \$100 million of discretionary, institutional AUM or
- have at least \$100 million of institutional AUA

Are reports available for purchase?

All collected employee feedback will be presented in an online interactive reporting tool called the Employee Feedback Data Dashboard. The dashboard will allow each employer to view data by graphs, charts and tables. Plus, standard downloadable reports containing responses by demographic, employee comments and benchmarks are also available. This data is available for purchase for as little as \$995 and discounts are available if pre-purchased.

Recognition:

Those who make the "best" list will be recognized in a special report produced by *Pensions & Investments* in December 2025. The identities of organizations not making the list will be kept confidential.

Pensions&Investments
**BEST
PLACES
TO WORK**
IN MONEY MANAGEMENT

★★ 2026 ★★

What does it cost?

All organizations pay a non-refundable \$199 registration fee. Organizations needing paper, have additional fees to cover the costs of printing, shipping, etc. More details available online.

No. of Empl. in the US	No of Empl Surveyed	Online	Paper
20 - 24	All	\$199	\$430
25 - 99	All	\$199	\$475
100 - 199	All	\$199	\$675
200 - 499	Up to 300**	\$199	\$875
500 - 999	400**	\$199	\$975
1000+	500**	\$199	\$1,175

**fees are non refundable **employees are randomly selected*

To register visit: www.PIBestPlacesToWork.com

For answers to any questions, please email answers@workforcerg.com or call (281) 602-5004.