




SOUTHLEA'S ASSET MANAGEMENT COMPENSATION SURVEY

2026 Survey Overview

Participate in Canada's most innovative compensation database for leading asset management firms. The database is anchored in our deep understanding of how compensation is structured to ensure you can draw out meaningful insights to maintain competitiveness across all job families.

The benefits of this survey include:

Benefit	Southlea Differentiators
Simplified participation	<ul style="list-style-type: none"> ▪ Simple data input template to facilitate easy transfers from your HRIS ▪ Jobs matched by Southlea (validated by you) against standard job families and levels ▪ Detailed aggregate reviews of the data, leveraging technology developed by our compensation database specialist to identify variances ▪ Secure and encrypted online systems to facilitate data reporting
Holistic perspectives	<ul style="list-style-type: none"> ▪ Ongoing engagement with participants to customize job matching / leveling approach and identify any tough-to-match match jobs / factors that impact compensation ▪ Additional elements of pay including target, actual, and maximum total compensation ▪ Connections between compensation and demographics to facilitate talent and workforce planning
Improved reporting and insights	<ul style="list-style-type: none"> ▪ Customized reporting templates to draw out key insights and trends ▪ Regular updates to keep pace with labour market movements ▪ Engagement with participants to ensure continued improvement ▪ Carried interest data (\$ and pts) on request for select investment roles, where available

 Targeted Participants	 Pricing	 Timing
<ul style="list-style-type: none"> ▪ Maple 8 pension funds ▪ Other Canadian pension funds ▪ Independent asset managers ▪ Captive asset managers 	<ul style="list-style-type: none"> ▪ \$7,500 CAD for data effective April 1 segmented by participant category (industry and size), where possible ▪ Customized reporting to be charged based on scope of request 	<ul style="list-style-type: none"> ▪ Survey submissions are due by April 30th ▪ Results will be reported as soon possible in August

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DATA ELEMENTS COLLECTED

We're looking for one file from your HRIS or similar system that includes the following elements for each role in your organization (will be used **by Southlea** to level / match roles to survey; validated by you):

Incumbent Position Information:	Incumbent Pay Information:	Firm / Asset Class Information
<ul style="list-style-type: none"> ▪ Incumbent ID ▪ Division ▪ Department / Asset Class ▪ Internal Position Title ▪ Internal Salary Grade ▪ Manager Incumbent ID ▪ Location of Incumbent ▪ Gender ▪ Date of Birth ▪ Date of Hire ▪ Date Started in Position 	<ul style="list-style-type: none"> ▪ Most Recent Salary ▪ Target, Actual, and Maximum: <ul style="list-style-type: none"> ▪ Short-term / Annual Incentive % of Salary ▪ Short-term / Annual Incentive \$ ▪ Long-term / Deferred Incentive % of Salary ▪ Long-term / Deferred Incentive % ▪ Carry allocation (\$ and %) where relevant / available 	<ul style="list-style-type: none"> ▪ Fiscal Year End ▪ Number of Operating Regions ▪ Number of Employees ▪ AUM (total and by asset class) ▪ % Internally / Externally Managed (overall and by asset class)

DATA REPORTING

Data are aggregated and reported back to you (25th, 50th, 75th percentiles of each element above) for hundreds of unique roles. Each job in your organization will be matched to a group, sub-group, discipline, and level below:

Investment										
Public Asset Classes				Private Asset Classes				Other Investment-related		
Fixed Income Public Equities Research and Economics Quantitative Strategies Trading				Private Credit Private Equity Infrastructure & Natural Resources Real Estate				Overall Management (CIO) Externally Managed Investments Responsible Investing Investment Strategy / Asset Mix		
Corporate										
Finance	Risk	IT	HR	Legal	Comms.	Services	Gen. Mgmt.			
Investment Corporate Tax Valuations Perf. Meas. Audit Treasury Inv. Ops. Generalist	Enterprise Investment Generalist	Corporate Inv. Apps. Cyber Data Project Mgmt. Generalist	Total Rewards Talent HRBP Generalist	Investment Corporate Compliance Generalist	Internal External Generalist	Pension / Member Client Generalist	Overall Mgmt. (CEO) Strategy and Operations / Admin			
Levels										
1	2	3	4	5	6	7	8	9	10	11
CEO	Executive 2	Executive 1	Renowned Expert	Senior Expert	Expert	Specialized	Proficient	Intermediate	Entry	Admin.