



2025-2026

Salary & Incentive Survey Questions

This is a sample

Feel free to use this PDF to gather data you might need before taking the survey online.

Participation Agreement

Ownership and Title

Nothing contained in this Agreement grants the respondent, either expressly or implied, any right, title, interest, or license in or to the intellectual property of BalancedComp.

Confidentiality

BalancedComp agrees it shall not use the respondent information for any purpose outside the scope of services. Individual Respondent data will not be singled out and that all data will be anonymized before publication. Access to respondent information shall be restricted to those employees who need to know such information to perform services agreed to by the respondent.

All written and oral information and material disclosed or provided by BalancedComp to the respondent under this Agreement is Confidential Information, regardless of whether it was provided before or after the date of this Agreement or how it was provided to the Respondent. Confidential Information will not include information that:

1. is commonly known in the Financial or Human Resources industry.
2. is now or subsequently becomes generally available to the public through no wrongful act of the respondent.
3. that was rightfully in the possession of the Respondent prior to disclosure by BalancedComp to the respondent.
4. is independently created by the respondent without direct or indirect use of the Confidential Information.
5. is obtained from a third party who has the right to transfer or disclose the information.

Remedies

Both parties agree and acknowledge that the Confidential Information is of a proprietary and confidential nature and that any disclosure of the Confidential Information to a third party is a breach of this Agreement and cannot be reasonably or adequately compensated for in monetary damages and would cause irreparable injury to the non-disclosing party. Accordingly, each party agrees the non-disclosing party is entitled to, in addition to all other rights and remedies available to it at law or in equity, and injunction restraining the disclosing party and any agents of the disclosing party, from directly or indirectly committing or engaging in any restricted by this Agreement in relation to the Confidential Information.

Nice to meet you!

1. **First Name**
2. **Last Name**
3. **Position Title**
4. **Email**
5. **Phone**

Where do you work?

1. **Institution Name**
2. **Assets (in millions)**
3. **Industry**
4. **State**
5. **County**

Importing

1. What needs to be included?

Just wages and job titles for each employee - no names necessary!

2. What should I include for Incentive Pay?

Cash compensation provided to an employee, is separate from base pay, and based on performance, which is thought to entice the employee to continue delivering positive results. Incentive pay may come in the form of a bonus, profit-sharing, or commission. (Please report payouts effective 12/31/2024).

Wages Combine in One Column & Incentive Combined in One Column

<i>Position</i>	<i>Salary</i>	<i>Total Incentive Pay</i>
Teller	\$10.30	\$300.00
Teller	\$15.00	\$600.00
Teller II	\$10.60	\$250.00
Branch Manager	\$24.04	\$100.00
CFO	\$130,000.00	\$10,000.00

Wages in Two Columns & Incentive Data in Multiple Columns

<i>Position</i>	<i>Hourly</i>	<i>Annual</i>	<i>Christmas Bonus</i>	<i>Referral Bonus</i>	<i>etc.</i>
Teller	\$10.00	\$20,800.00	\$100.00	\$200.00	etc.
Teller	\$10.30	\$21,424.00	\$200.00	\$400.00	etc.
Teller II	\$10.60	\$22,048.00	\$50.00	\$200.00	etc.
Branch Manager	\$24.04	\$50,000.00	\$100.00	\$0.00	etc.
CFO	\$62.50	\$130,000.00	\$10,000.00	\$0.00	etc.

HRIS/Payroll

1. What Human Resource Information System (HRIS) does your organization use?
2. What payroll system does your organization use?

Budgeting

1. What was your organization's average salary increase percentage from last year's merit labor budget?
2. What was your organization's average NON-EXEMPT salary increase percentage from last year's merit labor budget?
3. What was your organization's average EXEMPT salary increase percentage from last year's merit labor budget?
4. What was your organization's average EXECUTIVE salary increase percentage from last year's merit labor budget?
5. What is your organization's projected average salary increase percentage for this year's merit labor budget?
6. What is your organization's projected average NON-EXEMPT salary increase percentage for this year's merit labor budget?
7. What is your organization's projected average EXEMPT salary increase percentage for this year's merit labor budget?
8. What is your organization's projected average EXECUTIVE salary increase percentage for this year's merit labor budget?
9. When are merit increases paid out to your NON-EXEMPT employees?
 - Hire Date
 - Date in Position
 - Custom date in January

- Custom date later in the year
- 10. When are merit increases paid out to your EXEMPT employees?**
- Hire Date
 - Date in Position
 - Custom date in January
 - Custom date later in the year
- 11. When are merit increases paid out to your EXECUTIVE employees?**
- Hire Date
 - Date in Position
 - Custom date in January
 - Custom date later in the year
- 12. Did you give out-of-cycle pay raises last year?**
- Yes - Across the board
 - Yes - For certain employees
 - Yes - For certain positions
 - Yes - For certain employees & certain positions
 - No
- 13. Do you plan to give out-of-cycle pay raises in 2025?**
- Yes - Across the board
 - Yes - For certain employees
 - Yes - For certain positions
 - Yes - For certain employees & certain positions
 - No
- 14. Do you prorate salary increases for employees working for the organization less than 1 year?**
- Yes
 - No
- 15. Does your organization have formal salary ranges?**
- Yes
 - No
 - No, but we intend to
- 16. Does your organization pay out a lump sum payment when an employee is paid at or over the maximum of the salary range?**
- Yes
 - No, they do not receive anything.

- No, they still receive a salary increase even if paid over the maximum of the range.
 - No, they still receive a salary increase because we don't have stated salary ranges.
17. Does your organization pay a premium for float positions?
- Yes
 - No
18. If yes to the previous question, how much is the premium?

Turnover

1. What was your primary reason(s) for your organization's turnover last year?
2. What was your organization's total turnover percentage from last year?
3. What was your organization's total Non-Exempt turnover last year?
4. What was your organization's total Exempt turnover last year?
5. Did your organization reduce or increase staff last year?
 - Reduce
 - Increase
 - No Change
6. Do you plan to conscientiously reduce or increase staff this year?
 - Reduce
 - Increase
 - Maintain at current levels
 - Increase in certain departments

Benefits - Health

1. What percentage of the total premium does the organization contribute toward an individual health insurance policy for an employee?
 - 0% - 100%
2. Compared to last year, has your organization's employer contribution changed for an individual health insurance policy?

- Yes, the employer contribution % increased
 - Yes, the employer contribution % decreased
 - No change
- 3. What percentage of the total premium does the organization contribute toward a family health insurance policy for an employee?**
- 0% - 100%
- 4. Compared to last year, has your organization's employer contribution changed for a family health insurance policy?**
- Yes, the employer contribution % increased
 - Yes, the employer contribution % decreased
 - No change

Retirement

- 1. Does your organization offer a 401(k)?**
- Yes
 - No
- 2. If yes to the last question, what is the maximum percentage of base pay the organization will match?**
- 0% - 21%+
- 3. Are employees obligated to contribute to the 401(K) to receive a match?**
- Yes
 - No, they receive regardless if they contribute
 - No, we do not pay a match
- 4. Does your organization offer a Roth IRA?**
- Yes
 - No

Benefits - SERP

- 1. Does your organization offer a supplemental executive retirement plan (SERP)?**

- Yes
 - No
 - No, but we intend to look into this in the future
2. **If yes to offering a supplemental executive retirement plan (SERP), what type of plan is it?**
- Split Dollar
 - Defined Benefit
 - Defined Contribution
 - Other
3. **If yes to SERP, how many payments are planned at retirement?**
- Lump Sum
 - 10 years
 - 15 years
 - 20 years
 - Lifetime
 - Other
4. **If yes to SERP, what is the total projected replacement amount for the CEO?**
- < \$250k
 - \$250k - \$500k
 - \$500k - \$999k
 - \$1m - \$1.5m
 - > \$1.5m
5. **If yes to having a SERP, how many employees are eligible to participate?**
- 0 - 20+
6. **If yes to SERP, what is the total projected replacement amount for the other executives?**
- < \$250k
 - \$250k - \$500k
 - \$500k - \$999k
 - \$1m - \$1.5m
 - > \$1.5m

CEO

7. **What was your CEO's salary increase from last year's merit labor budget?**
8. **Do you have a CEO Succession Plan?**

- Yes
- No
- No, but we plan to get one

9. Does your organization offer your CEO Medical Coverage?

- Yes
- No

10. Does your organization offer your CEO Dental Coverage?

- Yes
- No

11. Does your organization offer your CEO Vision Coverage?

- Yes
- No

12. Does your organization offer your CEO Basic Life Insurance?

- Yes
- No

13. Does your organization offer your CEO Long Term Disability Insurance?

- Yes
- No

14. Does your organization offer your CEO Short Term Disability Insurance?

- Yes
- No

15. Do you offer your CEO a POS (Point of Service) plan?

- Yes
- No

16. Do you offer your CEO a PPO (Preferred Provider Organization) plan?

- Yes
- No

17. Do you offer your CEO a HMO (Health Maintenance Organization) plan?

- Yes
- No

18. Does your organization offer your CEO Retiree Medical Insurance?

- Yes
- No

19. Does your organization offer your CEO a Section 125 plan?

- Yes
- No

20. Do you offer your CEO Supplemental Life Insurance?

- Yes
- No

21. Do you offer your CEO a cell phone?

- Yes
- No

22. Do you offer your CEO an auto allowance?

- Yes
- No

23. If yes to the previous question, what is the annual auto allowance?

24. Do you offer your CEO discounted loans?

- Yes
- No

25. Do you offer your CEO educational benefits?

- Yes
- No

26. Do you offer your CEO a severance plan?

- Yes
- No

27. Do you offer your CEO paid spouse travel?

- Yes
- No

28. Do you offer your CEO access to private club memberships?

- Yes
- No

29. Do you offer your CEO access to health club memberships?

- Yes
- No

30. Do you offer your CEO home office equipment?

- Yes
- No

31. Do you offer your CEO a 457 (b)?

- Yes
- No

32. Do you offer your CEO a 457 (f)?

- Yes
- No

33. Do you offer your CEO a Split Dollar?

- Yes
- No

Gender & Minority Pay Equity

1. Did your organization conduct analysis for gender pay equity issues last year?

- Yes
- No
- No, but we plan to this year

2. If yes to the prior question, did your organization make wage corrections based on the analysis?

- Yes
- No

3. Did your organization conduct analysis for minority pay equity issues last year?

- Yes
- No
- No, but we plan to this year

4. If yes to the prior question, did your organization make wage corrections based on the analysis?

- Yes

- No

Minimum Wage

1. **Does your organization have an internal minimum wage that is higher than the state/federal/local minimum wage?**
 - Yes
 - No
2. **If yes, how much higher per hour is your internal wage than the regulated required amount?**
 - .50
 - 1.00
 - 1.50
 - 2.00
 - 2.50
 - 3.00
 - 3.50
 - 4.00
 - 4.50
 - 5.00
 - >\$5

Remote Work

1. **Does your organization hire remote employees outside of your operating markets?**
 - Yes
 - No
 - Yes, but it depends on the role
2. **If yes to the question, how is their compensation determined?**
 - Salary based on area they live
 - Salary based on corporate office
 - National Average
 - Other
3. **Are your remote workers allowed to have a hybrid schedule?**

- Yes
 - No
4. **Does your organization allow current employees to move outside of your operating markets to work remote?**
- Yes
 - No
 - Yes, but it depends on the role
5. **If yes to the prior question, is compensation adjusted?**
- Salary based on area they live
 - Salary based on corporate office
 - No adjustment made
 - Other
6. **What percentage of your workforce is work-from-home?**

Paid Time Off (PTO)

1. **Did your PTO policy change this year for NON-EXEMPT employees?**
- Increased
 - Decreased
 - Remained The Same
2. **Did your PTO policy change this year for EXEMPT employees?**
- Increased
 - Decreased
 - Remained The Same
3. **Does your organization allow you to carry over remaining PTO days to the following year?**
- Yes, we can carry over unlimited
 - Yes, we can carry over but it has a cap
 - No
4. **If you have a cap on PTO carryover days, what is the maximum number of days you can carry over?**

PTO - Non-Exempt

1. **How many PTO days are NON-EXEMPT employees offered with less than one year of service?**

2. How many PTO days are NON-EXEMPT employees offered with one to three years of service?
3. How many PTO days are NON-EXEMPT employees offered with three to five years of service?
4. What is the maximum number of PTO days a NON-EXEMPT employee can receive in a year?

PTO - Exempt

1. How many PTO days are EXEMPT employees offered with less than one year of service?
2. How many PTO days are EXEMPT employees offered with one to three years of service?
3. How many PTO days are EXEMPT employees offered with three to five years of service?
4. What is the maximum number of PTO days an EXEMPT employee can receive in a year?

Incentives

1. Does your organization have a corporate incentive/bonus plan in place for this year?
 - Yes
 - No
2. If you answered yes to the previous question, who is eligible to participate in the corporate incentive/bonus plan?
 - Everyone
 - Non-exempt
 - Exempt
 - Executives
 - Exempt & Executives
 - Specific Positions
3. What % of your overall payroll budget was awarded as variable pay last year?
4. This year, will your payout of variable pay:
 - Increase
 - Decrease

- Stay about the same
5. **Are you reevaluating your incentive plans in the next 12 months?**
 - Yes
 - No
 - Unsure
 6. **Do your employees need to be employed by January 1st to participate in the corporate incentive/bonus plan?**
 - Yes
 - No

Performance Management

1. **Does your organization currently use a performance management system?**
 - Yes
 - Yes, but we are looking to change
 - No, it's a manual process
 - No, but we plan to look into this in the future
2. **If yes to the last question, what performance management system/tool is your organization using?**
3. **How many performance levels does your organization use?**
 - 1 - 9+
4. **Does your organization use a self-rating performance review?**
 - Yes
 - No
5. **Systemically - Does your organization give higher performers a greater salary increase?**
 - Yes
 - No
 - At manager's request

Board Members

1. **Do you have a recruitment plan for new board members?**

- Yes
 - No
2. Does your organization provide paid health benefits to board members?
- Yes
 - No

Chairman of the Board

1. Is your Chairman of the Board also the CEO?
- Yes
 - No
1. Which of the following do you pay to the Chairman?
- Retainer, Board, and/or Committee Meeting Fees
2. How much did the Chairman of the board receive as an annual retainer fee last year?
3. How much did the Chairman of the board receive per board meeting last year?
4. How much did the Chairman of the board receive per committee meeting last year?
5. What was the total cash compensation (base plus any retainers and fees, plus incentives) received by the Chairman of the Board last year?

Inside Directors

1. How many Inside Directors currently sit on the board?
- 0 - 16+
2. Which of the following do you pay to your Inside Directors?
- Retainer, Board, and/or Committee Meeting Fees
3. What was the average annual retainer fee paid to an Inside Director last year?
4. What was the average per board meeting fee paid to an Inside Director last year?
5. What was the average per committee meeting fee paid to an Inside Director last year?

6. What was the average total cash compensation received by Inside Directors last year?

Outside Directors

1. How many Outside Directors currently sit on the board?
 - 0 - 16+
2. Which of the following do you pay to your Outside Directors?
 - Retainer, Board, and/or Committee Meeting Fees
3. What was the average annual retainer fee paid to an Outside Director last year?
4. What was the average per board meeting fee paid to an Outside Director last year?
5. What was the average per committee meeting fee paid to an Outside Director last year?
6. What was the average total cash compensation received by Outside Directors last year?
7. Do you offer retirement benefits to your Outside Directors?
 - Yes
 - No?

Financial Advisors

1. What is your Financial Advisors average gross dealer concession (GDC) from last year?
2. How many tiers are there for commissions?
 - 1 - 6+
3. What % of gross dealers commission are they paid out?
 - 10-20%
 - 20-30%
 - 30-40%
 - 40-50%
 - 50-60%
4. Are your Financial Advisors eligible for 401(k)?
 - Yes

- No
5. **Are your Financial Advisors eligible for PTO?**
 - Yes
 - No
 6. **Are your Financial Advisors eligible for health benefits?**
 - Yes
 - No
 7. **Are your Financial Advisors eligible for retirement benefits?**
 - Yes
 - No
 8. **What is your Financial Advisors average annual production from last year?**
 9. **What is your Financial Advisors average annual total cash compensation from last year?**

Conclusion

1. **Are there any questions that you would like us to incorporate in the survey?**
2. **Are there any positions you would like us to include in the survey?**
3. **Do you have any general feedback on the participation process or finalized results of the BalancedComp Salary & Incentive Survey?**
4. **How long did this survey take you to complete?**
5. **For your participation, which charity would you like us to donate to?**
 - Women's Microfinance Initiative
 - Humane Society of the United States
 - Nehemiah Village (Housing/Ministry for the ex-incarcerated)
 - Operation Smile (Cleft palate surgeries for the impoverished)
 - International Refugee Committee