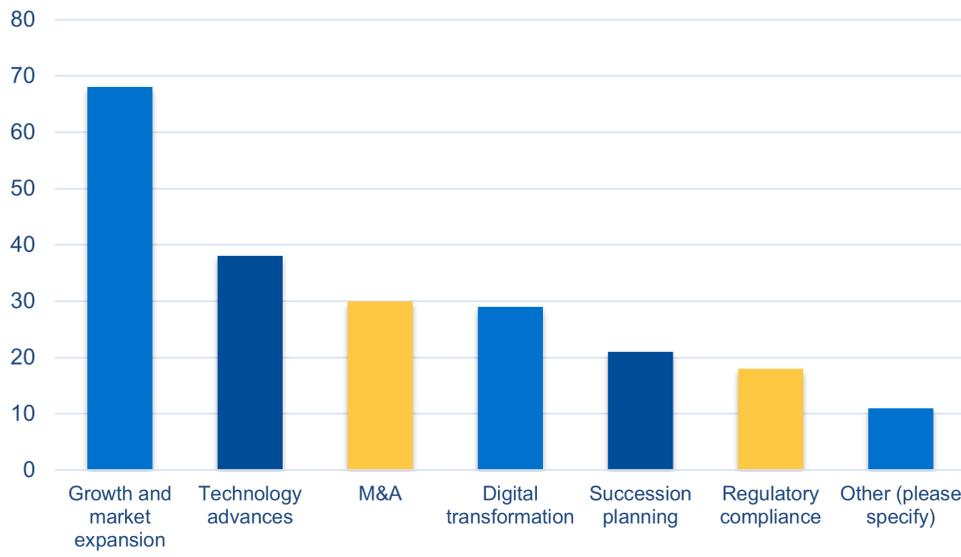


2025 Industry Survey Results

How does your firm rank?

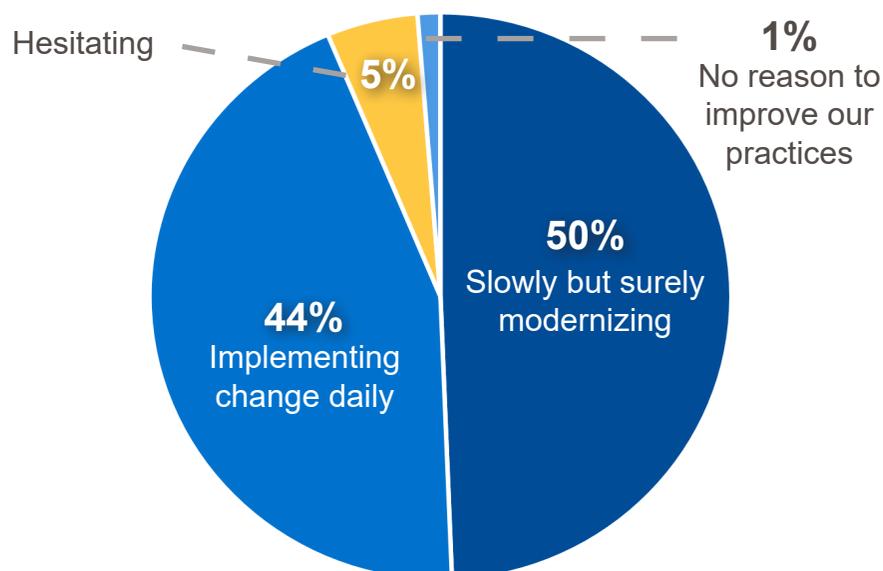
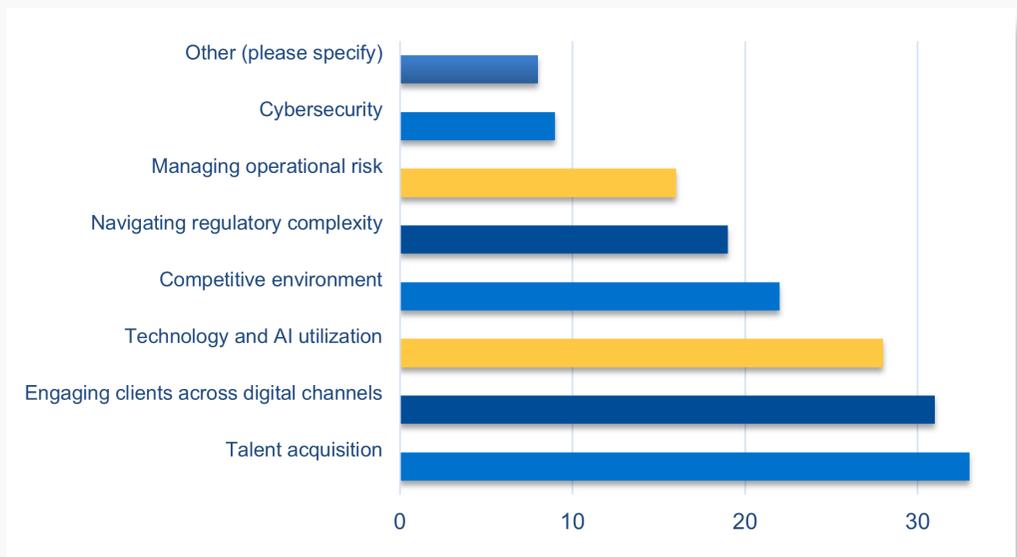


What are your top three strategic priorities for the next 12 months?

In contrast to the 2024 survey results, succession planning and M&A have declined as primary strategic drivers. In their place, market expansion and technological advancements have emerged as top priorities for many firms, suggesting firms are looking for greater organic means for growth.

What are your biggest pain points right now?

Strategic priorities have evolved since 2024, with talent acquisition officially emerging as a significant pain point for many firms. While client-related issues remain among primary concerns, there is a growing urgency regarding technological integration. This trend reflects a dual focus on maintaining client service levels while navigating the complexities of human capital and emerging technology.



Compared to your peers, how well do you feel your firm is adapting and modernizing practices to stay competitive with the many technological advances available?

While many firms continue to modernize at a measured pace, a growing number are exhibiting hesitation. Interestingly, this cautious approach is not driven by fiscal constraints, as none of our respondents cited financial issues as a barrier to technology implementation this year.